

## AGENDA RESERVATION REQUEST

### CITY OF FRANKLIN COMMON COUNCIL

Please type or print

<b>Date Submitted:</b>	February 14, 2023	<b>Meeting Date:</b>	February 22, 2023
<b>Contact Information:</b>			
<b>Requested by:</b>	Dana Monson		
<b>On Behalf of Organization or Individual:</b>		EDC	
<b>Telephone:</b>	317-736-3631		
<b>Email address:</b>	dmonson@franklin.in.gov		
<b>Mailing Address:</b>	70 E. Monroe St., Franklin, IN 46131		
<b>Describe Request:</b>			
Yearly Tax Abatement Compliance Reports for Approval			
<b>List Supporting Documentation Provided:</b>			
Memo			
C 2023-14: Heartland Machine CF-1 Compliance Report			
C 2023-40: Shelby Gravel CF-1 RE Compliance Report			
C 2023-41: Shelby Gravel CF-1 PP Compliance Report			
<b>Who will present the request?</b>			
<b>Name:</b>	Dana Monson	<b>Telephone:</b>	317-736-3631

*The Franklin City Council meets on the 1st and 3rd Monday of each month at 6:00 p.m. in the Council Chambers of City Hall located at 70 E. Monroe Street. In order for an individual and/or agency to be considered for new business on the agenda, this reservation form and supporting documents must be received in the Mayor's office no later than 12:00 p.m. on the Wednesday before the meeting.*



## CITY OF FRANKLIN

Community Development Department

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# Memo

**To:** City Council Members  
**CC:** Mayor, Clerk-Treasurer, City Attorney  
**From:** Dana Monson, Community Development Specialist  
**Date:** February 22, 2023  
**Subject:** EDC – Tax Abatement Compliance

The Economic Development Commission found the following tax abatement compliance reports to be in substantial compliance and forwarded them to the City Council with favorable recommendations at their February 14, 2023 meeting:

- C 2023-14: Heartland Machine
- C 2023-40: Shelby Gravel RE
- C 2023-41: Shelby Gravel PP

Compliance documentation is attached for each case. Please contact me directly at 346-1254 or [dmonson@franklin.in.gov](mailto:dmonson@franklin.in.gov) if you have any questions regarding this information.



# CITY OF FRANKLIN

COMMUNITY DEVELOPMENT DEPARTMENT

## Memorandum

**To:** City of Franklin Economic Development Commission  
**From:** Dana Monson, Community Development Specialist  
**Date:** February 14, 2023  
**Re:** Case C 2023-14: Heartland Machine & Engineering, LLC

### Summary:

1. On March 18<sup>th</sup>, 2013, the Franklin Common Council passed Resolution No. 2013-11, approving a 10-year tax abatement on real property with a 2% Economic Development Fee for Heartland Machine & Engineering, located at 2848 N. Graham Road.
2. Actual and estimated benefits, as projected for 2022:

	Estimated on SB-1	Actual in 2022	Difference
Employees Retained	18	18	0
Salaries	\$1,080,144.00	\$1,414,780	\$334,636.00
New Employees	7	2	-5
Salaries	\$364,000	\$78,400.00	-\$285,600.00
Total Employees	25	20	-5
Total Salaries	\$1,444,144	\$1,493,180	\$49,036.00
Average Hourly Salaries	\$27.77	\$35.89	\$8.12
Real Property Improvements	\$800,000	\$1,102,251	\$302,251

3. Heartland Machine & Engineer planned to construct this building in 2013. It was not finished in 2013, but it was finished in 2014. They have exceeded their estimated real property improvement value by \$302,251.
4. In 2020 Heartland Machine was up two employees from the estimate on the SB-1 form; and the average hourly salary is \$3.30 higher than the SB-1 estimate. In 2021 the company was below employment numbers by 5 but up by \$8.12/hour in wages. 2022 remained unchanged from the previous year in terms of employment and wages.
5. The real property tax abatement for Heartland Machine & Engineering, LLC, is scheduled to expire in tax year 2025 payable 2026. The final compliance review will take place in 2025.

**Staff Recommendation:** Approval



January 26, 2023

Mrs. Dana Monson, Comm Development Specialist  
Dept. of Comm Development  
70 E. Monroe Street  
Franklin, IN 46131

RE: Tax Abatement Compliance for Heartland Machine & Engineering LLC

Dear Mrs. Monson:

Enclosed please find Form CF-1 (Compliance with Statement of Benefits) regarding compliance with the real and personal property tax abatements which were granted to Heartland Machine & Engineering LLC (HME) in 2013 under Franklin Common Council Resolution No. 13-11.

Our company has been successful in creating the full complement of jobs which had been proposed in the Statement of Benefits (Form SB-1). While the original proposal was to hire seven more employees, due to the current workforce and the company growth, we have only added 2 jobs. However, we did manage to retain the original 18. Even though we were not able to hire the additional, we did increase wages and provided benefits for all of our current employees.

As the economy comes out of the recession, there is still a goal of hiring more and continuing to grow the company.

Please do not hesitate to contact me if you have any questions or concerns regarding this matter.

Sincerely,

A handwritten signature in dark ink, appearing to read "Sandy Bennett", is written over the typed name and title.

Sandy Bennett  
Controller



# COMPLIANCE WITH STATEMENT OF BENEFITS REAL ESTATE IMPROVEMENTS

State Form 51766 (R3 / 2-13)

Prescribed by the Department of Local Government Finance

20 22 PAY 20 23

FORM CF-1 / Real Property

## PRIVACY NOTICE

The cost and any specific individual's salary information is confidential; the balance of the filing is public record per IC 6-1.1-12.1-5.1 (c) and (d).

### INSTRUCTIONS:

1. This form does not apply to property located in a residentially distressed area or any deduction for which the Statement of Benefits was approved before July 1, 1991.
2. Property owners must file this form with the county auditor and the designating body for their review regarding the compliance of the project with the Statement of Benefits (Form SB-1/Real Property).
3. This form must accompany the initial deduction application (Form 322/RE) that is filed with the county auditor.
4. This form must also be updated each year in which the deduction is applicable. It is filed with the county auditor and the designating body before May 15, or by the due date of the real property owner's personal property return that is filed in the township where the property is located. (IC 6-1.1-12.1-5.1(b))
5. With the approval of the designating body, compliance information for multiple projects may be consolidated on one (1) compliance form (Form CF-1/Real Property).


SECTION 1 TAXPAYER INFORMATION	
Name of taxpayer <b>Heartland Machine &amp; Engineering LLC</b>	County <b>Johnson</b>
Address of taxpayer (number and street, city, state, and ZIP code) <b>2848 Graham Road, Franklin, IN 46131 41-08-02-024-003.000-009</b>	DLGF taxing district number
Name of contact person <b>Sandy Bennett</b>	Telephone number <b>( 317 ) 494-3864</b>

SECTION 2 LOCATION AND DESCRIPTION OF PROPERTY		
Name of designating body <b>The City of Franklin Common Council</b>	Resolution number <b>13-11</b>	Estimated start date (month, day, year)
Location of property <b>2848 Graham Road, Franklin, IN 46131</b>		Actual start date (month, day, year)
Description of real property improvements <b>Construction of 20,000 square foot building to support machine tool distribution. The building provides office space, showroom facilities and warehousing.</b>		Estimated completion date (month, day, year)
		Actual completion date (month, day, year)

SECTION 3 EMPLOYEES AND SALARIES			
EMPLOYEES AND SALARIES		AS ESTIMATED ON SB-1	ACTUAL
Current number of employees		<b>18</b>	<b>20</b>
Salaries		<b>1,080,144</b>	<b>1,493,180</b>
Number of employees retained		<b>18</b>	<b>18</b>
Salaries		<b>1,080,144</b>	<b>1,414,780</b>
Number of additional employees		<b>7</b>	<b>2</b>
Salaries		<b>364,000</b>	<b>78,400</b>

SECTION 4 COST AND VALUES			
COST AND VALUES		REAL ESTATE IMPROVEMENTS	
AS ESTIMATED ON SB-1	COST	ASSESSED VALUE	
Values before project	<b>63,000</b>	<b>92,600</b>	
Plus: Values of proposed project	<b>800,00</b>	<b>800,000</b>	
Less: Values of any property being replaced			
Net values upon completion of project	<b>863,000</b>	<b>892,600</b>	
ACTUAL	COST	ASSESSED VALUE	
Values before project	<b>63,000</b>	<b>92,600</b>	
Plus: Values of proposed project	<b>1,102,251</b>	<b>1,200,000</b>	
Less: Values of any property being replaced			
Net values upon completion of project	<b>1,162,251</b>	<b>1,292,600</b>	

SECTION 5 WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER			
WASTE CONVERTED AND OTHER BENEFITS		AS ESTIMATED ON SB-1	ACTUAL
Amount of solid waste converted			
Amount of hazardous waste converted			
Other benefits:			

SECTION 6 TAXPAYER CERTIFICATION		
I hereby certify that the representations in this statement are true.		
Signature of authorized representative 	Title <b>Controller</b>	Date signed (month, day, year) <b>01/26/23</b>

OPTIONAL FOR USE BY A DESIGNATING BODY WHO ELECTS TO REVIEW THE COMPLIANCE WITH STATEMENT OF BENEFITS (FORM CF-1)  
THAT WAS APPROVED AFTER JUNE 30, 1991

**INSTRUCTIONS:** (IC 6-1.1-12.1-5.1 and IC 6-1.1-12.1-5.9)

1. Not later than forty-five (45) days after receipt of this form, the designating body may determine whether or not the property owner has substantially complied with the Statement of Benefits (Form SB-1/Real Property).
2. If the property owner is found **NOT** to be in substantial compliance, the designating body shall send the property owner written notice. The notice must include the reasons for the determination and the date, time and place of a hearing to be conducted by the designating body. The date of this hearing may not be more than thirty (30) days after the date this notice is mailed. A copy of the notice may be sent to the county auditor and the county assessor.
3. Based on the information presented at the hearing, the designating body shall determine whether or not the property owner has made reasonable efforts to substantially comply with the Statement of Benefits (Form SB-1/Real Property) and whether any failure to substantially comply was caused by factors beyond the control of the property owner.
4. If the designating body determines that the property owner has **NOT** made reasonable efforts to comply, then the designating body shall adopt a resolution terminating the property owner's deduction. If the designating body adopts such a resolution, the deduction does not apply to the next installment of property taxes owed by the property owner or to any subsequent installment of property taxes. The designating body shall immediately mail a certified copy of the resolution to: (1) the property owner; (2) the county auditor; and (3) the county assessor.

We have reviewed the CF-1 and find that:

- ☐ the property owner **IS** in substantial compliance
- ☐ the property owner **IS NOT** in substantial compliance
- ☐ other (specify) \_\_\_\_\_

Reasons for the determination (attach additional sheets if necessary)

Signature of authorized member

Date signed (month, day, year)

Attested by:

Designating body

If the property owner is found not to be in substantial compliance, the property owner shall receive the opportunity for a hearing. The following date and time has been set aside for the purpose of considering compliance. (Hearing must be held within thirty (30) days of the date of mailing of this notice.)

Time of hearing

☐ AM  
☐ PM

Date of hearing (month, day, year)

Location of hearing

**HEARING RESULTS (to be completed after the hearing)**

☐ Approved

☐ Denied (see instruction 5 above)

Reasons for the determination (attach additional sheets if necessary)

Signature of authorized member

Date signed (month, day, year)

Attested by:

Designating body

**APPEAL RIGHTS [IC 6-1.1-12.1-5.9(e)]**

A property owner whose deduction is denied by the designating body may appeal the designating body's decision by filing a complaint in the office of the Circuit or Superior Court together with a bond conditioned to pay the costs of the appeal if the appeal is determined against the property owner.



# CITY OF FRANKLIN

COMMUNITY DEVELOPMENT DEPARTMENT

## Memorandum

**To:** City of Franklin Economic Development Commission  
**From:** Dana Monson, Community Development Specialist  
**Date:** February 14, 2023  
**Re:** Case C 2023-40: Shelby Gravel (Res. 20-17 and Res. 20-18)

### Summary:

1. On November 16<sup>th</sup>, 2020, the Franklin Common Council passed Resolution No. 2020-17 and Resolution 202-18, approving a 10-year tax abatement on \$2,400,000 in real property with a 2% Economic Development Fee and a 6-year tax abatement on \$6,470,000 in personal property with a 5% Economic Development Fee, for Shelby Gravel located at Commerce Drive and Graham Road.

2. Actual and estimated benefits, as projected for 2022:

	Estimated on SB-1	Actual in 2022	Difference
Employees Retained	21	21	0
Salaries	\$1,048,320	\$1,647,450	\$599,130
New Employees	3	2	-1
Salaries	\$149,760	\$156,900	\$7,140
Total Employees	24	23	-1
Total Salaries	\$1,198,080	\$1,804,350	\$606,270
Average Hourly Salaries	\$24.00	\$37.00	+13.00
Real Property Improvements	\$2,400,000	\$3,022,610	\$622,610
Personal Property Improvements	\$6,470,000	\$7,701,163	\$1,231,163

3. Shelby Gravel had stated on their SB-1 form that construction would begin in 2021. The facility was completed in 2022. Currently they are down 1 new employee but are continuing to hire. They have retained all other employees.

4. Investment was completed in 2022 and they are above their investment for real property by \$622,610 and personal property by \$1,231,163

5. The real property tax abatement is scheduled to expire in tax year 2031 payable 2032. The final compliance review will take place in 2031.

6. The personal property tax abatement is scheduled to expire in tax year 2027 payable in 2028. The final compliance review will take place in 2027.

**Staff Recommendation:** Approval





Shelby Materials  
157 East Rampart Rd.  
P.O. Box 242  
Shelbyville, IN 46176  
317-398-4485  
317-398-2727 FAX

February 7, 2023

Mrs. Dana Monson, Community Development Specialist  
Department of Community Development  
70 East Monroe Street  
Franklin, IN 46131

Re: Tax Abatement Compliance for Shelby Gravel, Inc.

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<b>Concrete</b>	
■ Franklin	317-738-3445
■ Shelbyville	317-398-4485
■ Rushville	765-932-3292
■ Columbus	812-372-5553
■ Seymour	812-522-6221
■ Nashville	812-988-6206
■ Indianapolis	317-782-3200
■ Brownsburg	317-216-7555
■ Westfield	317-804-8100
■ Pendleton	317-827-0090

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<b>Aggregates</b>	
■ Edinburgh	812-526-2731
■ Franklin	812-526-2731
■ Shelbyville	765-763-7670
■ Rushville	765-763-7670

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<b>Trucking</b>	
■	317-398-4485

Dear Mrs. Monson:

Enclosed please find the form CF-1 (Compliance with Statement of Benefits) regarding compliance with real and personal property tax abatements which were granted to Shelby Gravel, Inc. in 2020 under Franklin Common Council Resolutions Numbers 20-17 and 20-18.

As can be seen from reviewing the documents attached, our company has completed the building of the ready-mix concrete plant and the adjacent office and garage. Overall Shelby Materials invested almost 8 million dollars in personal property along with over 3 million dollars in real property improvements. With our new plant in operation for 2022 we had a record year of production as Johnson County continues to see marked economic growth.

Throughout the course of the year our workforce number changes. Often people leave employment during the slower season (Dec-Feb) but our hiring picks back up during the rest of the year. For much of the year we had as many as 27 employees, exceeding our goal of 24, but as of the time of this report we currently sit at 23.

Please review all of the enclosed documents and if you have any questions or concerns regarding this matter, please feel free to contact me as set out below.

Sincerely,

Aaron Haehl  
Vice President  
Shelby Gravel, Inc. dba Shelby Materials  
[ahaehl@shelbymaterials.com](mailto:ahaehl@shelbymaterials.com)  
317-398-4485



[illegible]



Shelby Materials  
157 East Rampart Rd.  
P.O. Box 242  
Shelbyville, IN 46176  
317-398-4485  
317-398-2727 FAX

*Attachment to form CF-1*

*Comments Concerning Investment, Job Creation and Retention Schedules*

Shelby Materials continues to want to add employees. Our stated goal was 24 employees total from our starting point of 21. Currently we have added a net 2 employees for a total of 23 but are looking to add even more employees well beyond our goal of 24 due the significantly increased demand for concrete in the Johnson County market. During our busy months (summer and fall), we had up to 27 total employees. We continue to want to add employees especially as we move into the warmer months of the year.

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**Concrete**

▪ Franklin	317-738-3445
▪ Shelbyville	317-398-4485
▪ Rushville	765-932-3292
▪ Columbus	812-372-5553
▪ Seymour	812-522-6221
▪ Nashville	812-988-6206
▪ Indianapolis	317-782-3200
▪ Brownsburg	317-216-7555
▪ Westfield	317-804-8100
▪ Pendleton	317-827-0090

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**Aggregates**

▪ Edinburgh	812-526-2731
▪ Franklin	812-526-2731
▪ Shelbyville	765-763-7670
▪ Rushville	765-763-7670

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**Trucking**

▪ 317-398-4485
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# COMPLIANCE WITH STATEMENT OF BENEFITS REAL ESTATE IMPROVEMENTS

State Form 51766 (R3 / 2-13)

Prescribed by the Department of Local Government Finance

20 23 PAY 20 24

FORM CF-1 / Real Property

## PRIVACY NOTICE

The cost and any specific individual's salary information is confidential; the balance of the filing is public record per IC 6-1.1-12.1-3.1 (c) and (d).

### INSTRUCTIONS:

1. This form does not apply to property located in a residentially distressed area or any deduction for which the Statement of Benefits was approved before July 1, 1991.
2. Property owners must file this form with the county auditor and the designating body for their review regarding the compliance of the project with the Statement of Benefits (Form SB-1/Real Property).
3. This form must accompany the initial deduction application (Form 322/RE) that is filed with the county auditor.
4. This form must also be updated each year in which the deduction is applicable. It is filed with the county auditor and the designating body before May 15, or by the due date of the real property owner's personal property return that is filed in the township where the property is located. (IC 6-1.1-12.1-5.1(b))
5. With the approval of the designating body, compliance information for multiple projects may be consolidated on one (1) compliance form (Form CF-1/Real Property).

SECTION 1 TAXPAYER INFORMATION		
Name of taxpayer <b>Shelby Gravel, Inc dba</b>	County <b>Johnson</b>	
Address of taxpayer (number and street, city, state, and ZIP code) <b>PO Box 280, Shelbyville, IN 46176</b>	DLGF taxing district number <b>-</b>	
Name of contact person <b>Aaron Haehl</b>	Telephone number <b>( 317 ) 392-5502</b>	
SECTION 2 LOCATION AND DESCRIPTION OF PROPERTY		
Name of designating body <b>City of Franklin Common Council</b>	Resolution number <b>20-17</b>	Estimated start date (month, day, year) <b>3/1/2021</b>
Location of property <b>1961 N. Graham Rd, Franklin, IN 46131</b>	Actual start date (month, day, year) <b>3/1/2021</b>	
Description of real property improvements <b>Paved lot, added office/maintenance building, added ready mix plant and associated machinery and enclosed it with a building. Enclosed the property with a fence. Performed necessary drainage improvements on property and adjoining property and added necessary sewer and landscaping.</b>	Estimated completion date (month, day, year) <b>12/1/2022</b>	
Actual completion date (month, day, year) <b>2/28/2022</b>		
SECTION 3 EMPLOYEES AND SALARIES		
EMPLOYEES AND SALARIES	AS ESTIMATED ON SB-1	ACTUAL
Current number of employees	21	23
Salaries	55000	78450
Number of employees retained	21	21
Salaries	55000	78450
Number of additional employees	3	2
Salaries	55000	78450
SECTION 4 COST AND VALUES		
COST AND VALUES	REAL ESTATE IMPROVEMENTS	
AS ESTIMATED ON SB-1	COST	ASSESSED VALUE
Values before project		239,800
Plus: Values of proposed project	2,400,000	
Less: Values of any property being replaced		
Net values upon completion of project	2,400,000	
ACTUAL	COST	ASSESSED VALUE
Values before project		
Plus: Values of proposed project	3,022,610	
Less: Values of any property being replaced		
Net values upon completion of project	3,022,610	2,561,400
SECTION 5 WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER		
WASTE CONVERTED AND OTHER BENEFITS	AS ESTIMATED ON SB-1	ACTUAL
Amount of solid waste converted		
Amount of hazardous waste converted		
Other benefits:		
SECTION 6 TAXPAYER CERTIFICATION		
I hereby certify that the representations in this statement are true.		
Signature of authorized representative <i>Aaron Haehl</i>	Title <i>Chief Financial Officer</i>	Date signed (month, day, year) <b>2-7-2023</b>

OPTIONAL: FOR USE BY A DESIGNATING BODY WHO ELECTS TO REVIEW THE COMPLIANCE WITH STATEMENT OF BENEFITS (FORM CF-1)  
THAT WAS APPROVED AFTER JUNE 30, 1991

INSTRUCTIONS: (IC 6-1.1-12.1-5.1 and IC 6-1.1-12.1-5.9)

1. Not later than forty-five (45) days after receipt of this form, the designating body may determine whether or not the property owner has substantially complied with the Statement of Benefits (Form SB-1/Real Property).
2. If the property owner is found **NOT** to be in substantial compliance, the designating body shall send the property owner written notice. The notice must include the reasons for the determination and the date, time and place of a hearing to be conducted by the designating body. The date of this hearing may not be more than thirty (30) days after the date this notice is mailed. A copy of the notice may be sent to the county auditor and the county assessor.
3. Based on the information presented at the hearing, the designating body shall determine whether or not the property owner has made reasonable efforts to substantially comply with the Statement of Benefits (Form SB-1/Real Property) and whether any failure to substantially comply was caused by factors beyond the control of the property owner.
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We have reviewed the CF-1 and find that:

- ☐ the property owner **IS** in substantial compliance
- ☐ the property owner **IS NOT** in substantial compliance
- ☐ other (specify) \_\_\_\_\_

Reasons for the determination (attach additional sheets if necessary)

Signature of authorized member

Date signed (month, day, year)

Attested by:

Designating body

If the property owner is found not to be in substantial compliance, the property owner shall receive the opportunity for a hearing. The following date and time has been set aside for the purpose of considering compliance. (Hearing must be held within thirty (30) days of the date of mailing of this notice.)

Time of hearing

☐ AM  
☐ PM

Date of hearing (month, day, year)

Location of hearing

HEARING RESULTS (to be completed after the hearing)

☐ Approved

☐ Denied (see instruction 5 above)

Reasons for the determination (attach additional sheets if necessary)

Signature of authorized member

Date signed (month, day, year)

Attested by:

Designating body

APPEAL RIGHTS [IC 6-1.1-12.1-5.9(e)]

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# CITY OF FRANKLIN

COMMUNITY DEVELOPMENT DEPARTMENT

## Memorandum

**To:** City of Franklin Economic Development Commission  
**From:** Dana Monson, Community Development Specialist  
**Date:** February 14, 2023  
**Re:** Case C 2023-40: Shelby Gravel (Res. 20-17 and Res. 20-18)

### Summary:

1. On November 16<sup>th</sup>, 2020, the Franklin Common Council passed Resolution No. 2020-17 and Resolution 202-18, approving a 10-year tax abatement on \$2,400,000 in real property with a 2% Economic Development Fee and a 6-year tax abatement on \$6,470,000 in personal property with a 5% Economic Development Fee, for Shelby Gravel located at Commerce Drive and Graham Road.

2. Actual and estimated benefits, as projected for 2022:

	Estimated on SB-1	Actual in 2022	Difference
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Salaries	\$1,048,320	\$1,647,450	\$599,130
New Employees	3	2	-1
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Average Hourly Salaries	\$24.00	\$37.00	+13.00
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Personal Property Improvements	\$6,470,000	\$7,701,163	\$1,231,163

3. Shelby Gravel had stated on their SB-1 form that construction would begin in 2021. The facility was completed in 2022. Currently they are down 1 new employee but are continuing to hire. They have retained all other employees.

4. Investment was completed in 2022 and they are above their investment for real property by \$622,610 and personal property by \$1,231,163

5. The real property tax abatement is scheduled to expire in tax year 2031 payable 2032. The final compliance review will take place in 2031.

6. The personal property tax abatement is scheduled to expire in tax year 2027 payable in 2028. The final compliance review will take place in 2027.

**Staff Recommendation:** Approval



Shelby Materials  
157 East Rampart Rd.  
P.O. Box 242  
Shelbyville, IN 46176  
317-398-4485  
317-398-2727 FAX

February 7, 2023

Mrs. Dana Monson, Community Development Specialist  
Department of Community Development  
70 East Monroe Street  
Franklin, IN 46131

Re: Tax Abatement Compliance for Shelby Gravel, Inc.

Dear Mrs. Monson:

Enclosed please find the form CF-1 (Compliance with Statement of Benefits) regarding compliance with real and personal property tax abatements which were granted to Shelby Gravel, Inc. in 2020 under Franklin Common Council Resolutions Numbers 20-17 and 20-18.

As can be seen from reviewing the documents attached, our company has completed the building of the ready-mix concrete plant and the adjacent office and garage. Overall Shelby Materials invested almost 8 million dollars in personal property along with over 3 million dollars in real property improvements. With our new plant in operation for 2022 we had a record year of production as Johnson County continues to see marked economic growth.

Throughout the course of the year our workforce number changes. Often people leave employment during the slower season (Dec-Feb) but our hiring picks back up during the rest of the year. For much of the year we had as many as 27 employees, exceeding our goal of 24, but as of the time of this report we currently sit at 23.

Please review all of the enclosed documents and if you have any questions or concerns regarding this matter, please feel free to contact me as set out below.

Sincerely,

Aaron Haehl  
Vice President  
Shelby Gravel, Inc. dba Shelby Materials  
[ahaehl@shelbymaterials.com](mailto:ahaehl@shelbymaterials.com)  
317-398-4485

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**Concrete**

■ Franklin	317-738-3445
■ Shelbyville	317-398-4485
■ Rushville	765-932-3292
■ Columbus	812-372-5553
■ Seymour	812-522-6221
■ Nashville	812-888-6206
■ Indianapolis	317-782-3200
■ Brownsburg	317-216-7555
■ Westfield	317-804-8100
■ Pendleton	317-827-0090

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**Aggregates**

■ Edinburgh	812-526-2731
■ Franklin	812-526-2731
■ Shelbyville	765-763-7670
■ Rushville	765-763-7670

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**Trucking**

■ 317-398-4485
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Shelby Materials  
157 East Rampart Rd.  
P.O. Box 242  
Shelbyville, IN 46176  
317-398-4485  
317-398-2727 FAX

*Attachment to form CF-1*

*Comments Concerning Investment, Job Creation and Retention Schedules*

Shelby Materials continues to want to add employees. Our stated goal was 24 employees total from our starting point of 21. Currently we have added a net 2 employees for a total of 23 but are looking to add even more employees well beyond our goal of 24 due the significantly increased demand for concrete in the Johnson County market. During our busy months (summer and fall), we had up to 27 total employees. We continue to want to add employees especially as we move into the warmer months of the year.

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**Concrete**

■ Franklin	317-738-3445
■ Shelbyville	317-398-4485
■ Rushville	765-932-3292
■ Columbus	812-372-5553
■ Seymour	812-522-6221
■ Nashville	812-988-6206
■ Indianapolis	317-782-3200
■ Brownsburg	317-216-7555
■ Westfield	317-804-8100
■ Pendleton	317-827-0090

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**Aggregates**

■ Edinburgh	812-526-2731
■ Franklin	812-526-2731
■ Shelbyville	765-763-7670
■ Rushville	765-763-7670

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**Trucking**

■ 317-398-4485
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# COMPLIANCE WITH STATEMENT OF BENEFITS PERSONAL PROPERTY

State Form 51785 (R4 / 11-16)

Prescribed by the Department of Local Government Finance

**FORM CF-1 / PP**

## PRIVACY NOTICE

This form contains information  
confidential pursuant to  
IC 6-1.1-35-9 and IC 6-1.1-12.1-5.6

- INSTRUCTIONS:**
1. Property owners whose Statement of Benefits was approved must file this form with the local Designating Body to show the extent to which there has been compliance with the Statement of Benefits. (IC 6-1.1-12.1-5.6)
  2. This form must be filed with the Form 103-ERA Schedule of Deduction from Assessed Value between January 1 and May 15 of each year, unless a filing extension under IC 6-1.1-3.7 has been granted. A person who obtains a filing extension must file between January 1 and the extended due date of each year.
  3. With the approval of the designating body, compliance information for multiple projects may be consolidated on one (1) compliance (CF-1).

SECTION 1		TAXPAYER INFORMATION						
Name of taxpayer	Shelby Gravel, Inc dba Shelby Materials		County Johnson					
Address of taxpayer (number and street, city, state, and ZIP code)	PO Box 280 Shelbyville, IN 46176		DLGF taxing district number					
Name of contact person	Aaron Haehl		Telephone number ( 317 ) 392-5500					
SECTION 2		LOCATION AND DESCRIPTION OF PROPERTY						
Name of designating body	Resolution number	Estimated start date (month, day, year)						
City of Franklin Common Council	20-18	3/1/2021						
Location of property	Actual start date (month, day, year)							
1961 N Graham Rd, Franklin, IN 46131	3/1/2021							
Description of new manufacturing equipment, or new research and development equipment, or new information technology equipment, or new logistical distribution equipment to be acquired.	Estimated completion date (month, day, year)							
This project will be the site development and building of offices, maintenance facilities and a ready mix concrete plant for Shelby Materials. The new plant will improve efficiency of the operations that is not feasible at the current location.	12/1/2021							
	Actual completion date (month, day, year)							
	2/28/2022							
SECTION 3		EMPLOYEES AND SALARIES						
EMPLOYEES AND SALARIES		AS ESTIMATED ON SB-1	ACTUAL					
Current number of employees		21	23					
Salaries		55,000.00	78,450.00					
Number of employees retained		21	21					
Salaries		55,000.00	78,450.00					
Number of additional employees		3	2					
Salaries		55,000.00	78,450.00					
SECTION 4		COST AND VALUES						
	MANUFACTURING EQUIPMENT		R & D EQUIPMENT		LOGIST DIST EQUIPMENT		IT EQUIPMENT	
AS ESTIMATED ON SB-1	COST	ASSESSED VALUE	COST	ASSESSED VALUE	COST	ASSESSED VALUE	COST	ASSESSED VALUE
Values before project								
Plus: Values of proposed project	6,400,000.00							
Less: Values of any property being replaced								
Net values upon completion of project	6,400,000.00							
ACTUAL	COST	ASSESSED VALUE	COST	ASSESSED VALUE	COST	ASSESSED VALUE	COST	ASSESSED VALUE
Values before project								
Plus: Values of proposed project	7,701,163.00						53,925.00	
Less: Values of any property being replaced								
Net values upon completion of project	7,701,163.00						53,925.00	
<b>NOTE:</b> The COST of the property is confidential pursuant to IC 6-1.1-12.1-5.6(c).								
SECTION 5		WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER						
WASTE CONVERTED AND OTHER BENEFITS		AS ESTIMATED ON SB-1	ACTUAL					
Amount of solid waste converted								
Amount of hazardous waste converted								
Other benefits:								
SECTION 6		TAXPAYER CERTIFICATION						
I hereby certify that the representations in this statement are true.								
Signature of authorized representative	Title	Date signed (month, day, year)						
<i>Aaron Haehl</i>	Chief Financial Officer	2-7-2023						

OPTIONAL: FOR USE BY A DESIGNATING BODY WHO ELECTS TO REVIEW THE COMPLIANCE WITH STATEMENT OF BENEFITS (FORM CF-1)  
THAT WAS APPROVED AFTER JUNE 30, 1991.

**INSTRUCTIONS:** (IC 6-1.1-12.1-5.9)

1. This page does not apply to a Statement of Benefits filed before July 1, 1991; that deduction may not be terminated for a failure to comply with the Statement of Benefits.
2. Within forty-five (45) days after receipt of this form, the designating body may determine whether or not the property owner has substantially complied with the Statement of Benefits.
3. If the property owner is found **NOT** to be in substantial compliance, the designating body shall send the property owner written notice. The notice must include the reasons for the determination and the date, time and place of a hearing to be conducted by the designating body. If a notice is mailed to a property owner, a copy of the written notice will be sent to the County Assessor and the County Auditor.
4. Based on the information presented at the hearing, the designating body shall determine whether or not the property owner has made reasonable effort to substantially comply with the Statement of Benefits and whether any failure to substantially comply was caused by factors beyond the control of the property owner.
5. If the designating body determines that the property owner has **NOT** made reasonable effort to comply, then the designating body shall adopt a resolution terminating the deduction. The designating body shall immediately mail a certified copy of the resolution to: (1) the property owner; (2) the County Auditor; and (3) the County Assessor.

We have reviewed the CF-1 and find that:

- ☐ the property owner **IS** in substantial compliance
- ☐ the property owner **IS NOT** in substantial compliance
- ☐ other (specify) \_\_\_\_\_

Reasons for the determination (attach additional sheets if necessary)

Signature of authorized member

Date signed (month, day, year)

Attested by:

Designating body

If the property owner is found not to be in substantial compliance, the property owner shall receive the opportunity for a hearing. The following date and time has been set aside for the purpose of considering compliance.

Time of hearing

- ☐ AM  
☐ PM

Date of hearing (month, day, year)

Location of hearing

**HEARING RESULTS (to be completed after the hearing)**

☐ Approved

☐ Denied (see instruction 5 above)

Reasons for the determination (attach additional sheets if necessary)

Signature of authorized member

Date signed (month, day, year)

Attested by:

Designating body

**APPEAL RIGHTS [IC 6-1.1-12.1-5.9(e)]**

A property owner whose deduction is denied by the designating body may appeal the designating body's decision by filing a complaint in the office of the clerk of Circuit or Superior Court together with a bond conditioned to pay the costs of the appeal if the appeal is determined against the property owner.