**SCHOOL TRANSPORTATION EXCESS LEVY APPEAL**

**RESOLUTION**

The School Board of the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ School Corporation, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ County, State of Indiana, has determined to file for an excess levy appeal.

The School Corporation requests an increase to its operations fund maximum levy in the amount of \_\_\_\_\_\_\_\_\_\_\_\_\_\_.

To seek an increase to the operations fund maximum levy pursuant to IC 20-46-8-3 due to transportation cost increases of at least ten percent (10%) over the preceding year, the governing body of said school corporation hereby resolves to proceed with a petition for an excess levy to the Department of Local Government Finance.

Adopted this \_\_\_\_\_\_\_\_\_ day of \_\_\_\_\_\_\_\_\_\_\_, \_\_\_\_\_.

FOR AGAINST

ATTEST: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2019 TRANSPORTATION LEVY APPEAL (IC 20-46-8-3)**

**School Corporation Name:**

**County:**

**Amount requested: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Tax rate impact: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

1. **Did the school board advertise through the Notice to Taxpayers (Budget Form 3) and adopt a levy and tax rate high enough to allow for an excess levy appeal?**

**Y\_\_\_\_\_ N \_\_\_\_\_**

**(Please provide a copy of the Form 3 with the appeal documentation.)**

1. **The need for a levy increase is due to (check one or more, as appropriate):**

□ FUEL EXPENSE INCREASE:

2018 Gallon \_\_\_\_\_\_\_\_\_\_ x per Gallon Price \_\_\_\_\_\_\_\_\_ = \_\_\_\_\_\_\_\_\_\_\_\_

2017 Gallon \_\_\_\_\_\_\_\_\_\_ x per Gallon Price \_\_\_\_\_\_\_\_\_ = \_\_\_\_\_\_\_\_\_\_\_\_

Increase \_\_\_\_\_\_\_\_\_\_\_\_

(Est. 2019 Gallon \_\_\_\_\_\_\_\_\_\_ x per Gallon Price \_\_\_\_\_\_\_\_\_ = \_\_\_\_\_\_\_\_\_\_\_\_)

□ SIGNIFICANT INCREASE IN NUMBER OF STUDENTS TRANSPORTED OR MILES TRAVELED BY BUSES TRANSPORTING STUDENTS:

2018 Students Transported \_\_\_\_\_\_\_\_\_\_ 2018 Miles Traveled \_\_\_\_\_\_\_\_\_\_

2017 Students Transported \_\_\_\_\_\_\_\_\_\_ 2017 Miles Traveled \_\_\_\_\_\_\_\_\_\_

Difference \_\_\_\_\_\_\_\_\_\_ Difference \_\_\_\_\_\_\_\_\_\_

(Est. 2019 Students Transported \_\_\_\_\_\_\_\_\_\_ Est. 2019 Miles Traveled \_\_\_\_\_\_\_\_\_\_)

□ SIGNIFICANT INCREASE IN NUMBER OF SPECIAL EDUCATION STUDENTS TRANSPORTED OR MILES TRAVELED BY BUSES TRANSPORTING SPECIAL EDUCATION STUDENTS:

2018 Special Education Students Transported \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2017 Special Education Students Transported \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Difference \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Est. 2019 Special Education Students Transported \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)

2018 Special Education Miles Traveled \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2017 Special Education Miles Traveled \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Difference \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Est. 2019 Special Education Miles Traveled \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)

□ CHANGE IN TRANSPORTATION COSTS DUE TO COURT-ORDERED DESEGREGATION PLAN:

2018 Transportation Expenses under Plan \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2017 Transportation Expenses under Plan \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Difference \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Est. 2019 Transportation Expenses under Plan \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)

□ CLOSURE OF A SCHOOL BUILDING WITHIN THE SCHOOL CORPORATION THAT RESULTS IN A SIGNIFICANT INCREASE IN THE DISTANCES STUDENTS MUST BE TRANSPORTED TO ANOTHER SCHOOL BUILDING:

2018 Miles Traveled \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of closure \_\_\_\_\_\_\_\_\_\_\_\_

2017 Miles Traveled \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Building that closed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Est. 2019 Miles Traveled \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)

**Please complete the following sections to provide more detail about this appeal:**

1. Has the school corporation added any new transportation positions during the last three years? Y\_\_\_\_\_ N \_\_\_\_\_

If yes, please provide a list of positions and costs.

**Position**  Year Added Salary Benefits Total Costs

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_

1. **Assessed valuation growth during the last five years**:

**Year Assessed valuation Percentage +/-**

**from previous year**

2013 p 2014 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2014 p 2015 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2015 p 2016 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2016 p 2017 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2017 p 2018 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **Student Count (ADM)**

Year \_\_\_\_\_\_\_\_\_\_\_

Reg. Ed. Special Ed. Voc. Ed. # Bus Routes

A. Eligible Pupil Count \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

B. Round Trip Mileage \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

C. Linear Density (A/B) \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

Year \_\_\_\_\_\_\_\_\_\_\_

Reg. Ed. Special Ed. Voc. Ed. # Bus Routes

A. Eligible Pupil Count \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

B. Round Trip Mileage \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

C. Linear Density (A/B) \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

Year \_\_\_\_\_\_\_\_\_\_

Reg. Ed. Special Ed. Voc. Ed. # Bus Routes

A. Eligible Pupil Count \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

B. Round Trip Mileage \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

C. Linear Density (A/B) \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

Year \_\_\_\_\_\_\_\_\_

Reg. Ed. Special Ed. Voc. Ed. # Bus Routes

A. Eligible Pupil Count \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

B. Round Trip Mileage \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

C. Linear Density (A/B) \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

Year \_\_\_\_\_\_\_\_

Reg. Ed. Special Ed. Voc. Ed. # Bus Routes

A. Eligible Pupil Count \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

B. Round Trip Mileage \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

C. Linear Density (A/B) \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

Year \_\_\_\_\_\_\_\_\_

Reg. Ed. Special Ed. Voc. Ed. # Bus Routes

A. Eligible Pupil Count \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

B. Round Trip Mileage \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

C. Linear Density (A/B) \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

Year \_\_\_\_\_\_\_\_\_

Reg. Ed. Special Ed. Voc. Ed. # Bus Routes

A. Eligible Pupil Count \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

B. Round Trip Mileage \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

C. Linear Density (A/B) \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_

Comments:

1. **In what way does the information in this petition establish that the school corporation will be unable to provide transportation services without an increase to its transportation maximum levy?**
2. **Transportation Appeal Formula**

The Department of Local Government Finance uses the following formula in its review of Transportation appeals.

(**A** - **B**) x (**C**) = Potential Levy Increase Allowed

**A = % increase in certified budget (1.2 in example below)**

**(certified 2018 budget / certified 2017 budget = % increase in budget)**

**NOTE: When calculated, this number must be at least 1.10 to qualify for an appeal.**

**B = 2019 maximum levy growth factor (3.4% for Pay 2019)**

**C = 2018 transportation maximum levy ($100,000 in example below)**

Example:

**Certified 2018 budget = $1,200,000**

**Certified 2017 budget = $1,000,000**

**1,200,000** / **1,000,000** = **1.20 (% increase in transportation operating costs)**

(**1.20** - **1**.**034**) x (**$100,000**) = Levy Increase Allowed

(.166) x (**$100,000**) = Levy Increase Allowed

**(16,600) = Potential Levy Increase Allowed**

***School Calculation:***

1. **Certified 2018 budget = $**
2. **Certified 2017 budget = $**
3. **% increase in transportation operating costs =**
4. **2019 maximum levy growth factor = 3.4%**
5. **2018 transportation maximum levy = $**

**Line 1** / **Line 2** = **Line A**

(**Line A** - **Line B**) x **Line C** = Potential Levy Increase Allowed

***Potential Levy Increase Allowed:* *$***

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **VIII. ACCOUNTS TO BE CONSIDERED FOR INCREASED TRANSPORTATION LEVY** | | | | | | |
| **Account Name and Number to be Considered for a Transportation Appeal** | **Column 1 2013 Actual Expenditures\*** | **Column 2 2014 Actual Expenditures\*** | **Column 3 2015 Actual Expenditures\*** | **Column 4 2016 Actual Expenditures\*** | **Column 5 2017 Actual Expenditures\*** | **Column 6 2018 Estimated Expenditures** |
| 25520 Vehicle Operations |  |  |  |  |  |  |
| 25530 Monitoring Services |  |  |  |  |  |  |
| 25540 Vehicle Service Maintenance |  |  |  |  |  |  |
| 25560 Bus Insurance |  |  |  |  |  |  |
| 25570 Insurance on Pupils |  |  |  |  |  |  |
| 25580 Contracted Pupil Transp. Service |  |  |  |  |  |  |
| 25590 Other Pupil Transp. Service |  |  |  |  |  |  |
| 25591 Bus Driver Training |  |  |  |  |  |  |
| 26491 PERF |  |  |  |  |  |  |
| 26492 Social Security |  |  |  |  |  |  |
| 26493 Workmen’s Comp. |  |  |  |  |  |  |
| 26494 Group Insurance |  |  |  |  |  |  |
| 26496 Unemployment Comp. |  |  |  |  |  |  |
| 26497 Teachers’ Retirement Fund |  |  |  |  |  |  |
| 26498 Severance/Early Retirement Pay |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |
| Total Operating Expenses |  |  |  |  |  |  |

**\*If totals do not agree with your Calendar Financial Report as submitted to the Indiana Department of Education, please provide a detailed explanation.**