



Chapter 313 Annual Eligibility Report Form

Economic Development
and Analysis
Form 50-772-A

SECTION 1: Applicant and District Information

1. Tax year covered by this report: 2015
NOTE: This report must be completed and submitted to the school district by May 15 of every year using information from the previous tax (calendar) year.
2. Application number: 228
NOTE: You can find your application number and all agreement documents and reports on the website www.texasahead.org/tax_programs/chapter313/applicants
3. Name of school district: Chillicothe ISD
4. Name of project on original application (or short description of facility): Blue Summit Wind, LLC
5. Name of applicant on original application: Blue Summit Wind, LLC
6. Name the company entering into original agreement with district: Blue Summit Wind, LLC
7. Amount of limitation at time of application approval: \$10,000,000
8. If you are one of two or more companies originally applying for a limitation, list all other applicants here and describe their relationships. (Use attachments if necessary.)

n/a

SECTION 2: Current Agreement Information

1. Name of current agreement holder(s) Blue Summit Wind, LLC
2. Complete mailing address of current agreement holder 700 Universe Blvd., PSX/JB; Juno Beach, FL 33408
3. Company contact person for agreement holder:
- | | |
|---------------------|---------------------------------|
| <u>Mona Coates</u> | <u>Sr. Property Tax Analyst</u> |
| Name | Title |
| <u>561-691-2118</u> | <u>mona.coates@pl.com</u> |
| Phone | Email |
4. Texas franchise tax ID number of current agreement holder: 11137881576
5. If the current agreement holder does not report under the franchise tax law, please include name and tax ID of reporting entity:
- | | |
|------------|------------|
| <u>n/a</u> | <u>n/a</u> |
| Name | Tax ID |
6. If the authorized company representative (same as signatory for this form) is different from the contact person listed above, complete the following:
- | | |
|--------------------------|------------|
| <u>n/a</u> | <u>n/a</u> |
| Name | Title |
| <u>n/a</u> | |
| Complete Mailing Address | |
| <u>n/a</u> | <u>n/a</u> |
| Phone | Email |
7. If you are a current agreement holder who was not an original applicant, please list all other current agreement holders. Please describe the chain of ownership from the original applicant to the new entities. (Use attachments if necessary.)

n/a

SECTION 3: Applicant Eligibility Information

1. Does the business entity have the right to transact business with respect to Tax Code, Chapter 1717
 (Attach printout from Comptroller Web site: <http://www.window.state.tx.us/taxinfo/coasint.html>) Yes No
 2. Is the business entity current on all taxes due to the State of Texas? Yes No
 3. Is the business activity of the project an eligible business activity under Section 313.024(b)? Yes No
- 3a. Please identify business activity: Renewable Energy

SECTION 4: Qualified Property Information

1. Market value for reporting year: \$ 89,836,220.00
2. I&S taxable value for reporting year: \$ 89,836,220.00
3. M&O taxable value for reporting year: \$ 10,000,000.00

SECTION 5A: Wage and Employment Information for Applications Prior to Jan. 1, 2014 (#1 Through 999)

ONLY COMPLETE THE WAGE SECTION (5A OR 5B) THAT APPLIES TO YOUR APPLICATION. You can find your application number on the website at www.texasahead.org/tax_programs/chapter313/applicants.

NOTE: All statutory references in Section 5A are for statute as it existed prior to Jan. 1, 2014. For job definitions see TAC §9.1051(14) and Tax Code, §313.021(3). If the agreement includes a definition of "new job" other than TAC §9.1051(14)(C), then please provide the definition "new job" as used in the agreement. Notwithstanding any waiver by the district of the requirement for the creation of a minimum number of new jobs, or any other job commitment in the agreement, Tax Code §313.024(d) requires that 80 percent of all new jobs be qualifying jobs.

1. How many new jobs were based on the qualified property in the year covered by this report? (See note above) 4
2. What is the number of new jobs required for a project in this school district according to §313.021(2)(A)(iv)(b), §313.051(b), as appropriate? 10
3. Did the applicant request that the governing body waive the minimum job requirement, as provided under Tax Code §313.025(f-1)? Yes No
 - 3a. If yes, how many new jobs must the approved applicant create under the waiver? 4
4. Calculate 80 percent of new jobs (0.80 x number of new jobs based on the qualified property in the year covered by this report.) 3.2
5. What is the minimum required annual wage for each qualifying job in the year covered by the report? \$ 41,968.00
6. Identify which of the four Tax Code sections is used to determine the wage standard required by the agreement:

§313.021(5)(A) or §313.021(5)(B) or §313.021(3)(E)(ii) or §313.051(b)

 - 6a. Attach calculations and cite exact Texas Workforce Commission data source as defined in TAC §9.1051.
7. Does the agreement require the applicant to provide a specified number of jobs at a specified wage? Yes No
 - 7a. If yes, how many qualifying jobs did the approved applicant commit to create in the year covered by the report? 4
 - 7b. If yes, what annual wage did the approved applicant commit to pay in the year covered by the report? \$ 48,000.00
 - 7c. If yes, how many qualifying jobs were created at the specified wage in the year covered by the report? 4
8. How many qualifying jobs (employees of this entity and employees of a contractor with this entity) were based on the qualified property in the year covered by the report? 4
 - 8a. Of the qualifying job-holders last year, how many were employees of the approved applicant? 4
 - 8b. Of the qualifying job-holders last year, how many were employees of an entity contracting with the approved applicant? 0
 - 8c. If any qualifying job-holders were employees of an entity contracting with the applicant, does the approved applicant or assignee have documentation from the contractor supporting the conclusion that those jobs are qualifying jobs? Yes No N/A

SECTION 5B: Wage and Employment Information for Applications After Jan. 1, 2014 (#1000 and Above)

ONLY COMPLETE THE WAGE SECTION (5A or 5B) THAT APPLIES TO YOUR APPLICATION. You can find your application number on the website at www.texasahead.org/tax_programs/chapter313/applicants.

NOTE: For job definitions see TAC §9.1051(14) and Tax Code, §313.021(3).

QUALIFYING JOBS

1. What is the number of new qualifying jobs the applicant committed to create in the year covered by this report?
2. Did the applicant request that the governing body waive the minimum qualifying job requirement, as provided under Tax Code §313.025(f-1)? Yes No
 - 2a. If yes, how many new qualifying jobs must the approved applicant create under the waiver?
3. Which Tax Code section are you using to determine the wage standard required for this project? §313.021(5)(A) or §313.021(5)(B)
 - 3a. Attach calculations and cite exact Texas Workforce Commission data sources as defined in TAC §9.1051.
4. What is the minimum required annual wage for each qualifying job in the year covered by this report? \$
5. What is the annual wage the applicant committed to pay for each of the qualifying jobs in the year covered by this report? \$
6. Do the qualifying jobs meet all minimum requirements set out in Tax Code §313.021(3)? Yes No

NON-QUALIFYING JOBS

7. What is the number of non-qualifying jobs the applicant had on Dec. 31 of the year covered by this report?
8. What was the average wage you were paying for non-qualifying jobs on Dec. 31 of the year covered by this report? .. \$
9. What is the county average weekly wage for non-qualifying jobs, as defined in TAC §9.1051? \$

MISCELLANEOUS

10. Did the applicant rely on a determination by the Texas Workforce Commission under the provisions §313.024(3)(F) in meeting the minimum qualifying job requirements? Yes No
 - 10a. If yes, attach supporting documentation to evidence that the requirements of §313.021(3)(F) were met.
11. Are you part of a Single Unified Project (SUP) and relying on the provisions in Tax Code §313.024(d-2) to meet the qualifying job requirements? Yes No
 - 11a. If yes, attach supporting documentation from the Texas Economic Development and Tourism Office including a list of the other school district(s) and the qualifying jobs located in each.

SECTION 6: Qualified Investment During Qualified Time Period

ENTITIES ARE NOT REQUIRED TO COMPLETE THIS SECTION IF THE YEAR COVERED BY THE REPORT IS AFTER THE QUALIFYING TIME PERIOD OF THEIR AGREEMENT.

1. What is the qualified investment expended by this entity from the beginning of the qualifying time period through the end of the year covered by this report? \$
2. Was any of the land classified as qualified investment? Yes No
3. Was any of the qualified investment leased under a capitalized lease? Yes No
4. Was any of the qualified investment leased under an operating lease? Yes No
5. Was any property not owned by the applicant part of the qualified investment? Yes No

SECTION 7: Partial Interest

THE FOLLOWING QUESTIONS MUST BE ANSWERED BY ENTITIES HAVING A PARTIAL INTEREST IN AN AGREEMENT. For limitation agreements where there are multiple company entities that receive a part of the limitation provided by the agreement: 1) each business entity not having a full interest in the agreement should complete a separate form for their proportionate share of required employment and investment information; and, 2) separately, the school district is required to complete an Annual Eligibility Report that provides for each question in this form a sum of the individual answers from reports submitted by each entity so that there is a cumulative Annual Eligibility Report reflecting the entire agreement.

1. What was your limitation amount (or portion of original limitation amount) during the year covered by this report? . . . n/a
2. Please describe your interest in the agreement and identify all the documents creating that interest.

n/a

SECTION 8: Approval

"I am the authorized representative for the Company submitting this Annual Eligibility Report. I understand that this Report is a government record as defined in Chapter 37 of the Texas Penal Code. The information I am providing on this Report is true and correct to the best of my knowledge and belief."

print
here ▶

Mona Coates

Print Name (Authorized Company Representative)

Sr. Property Tax Analyst

Title

sign
here ▶

Mona Coates

Signature (Authorized Company Representative)

5/6/16

Date

print
here ▶

Mona Coates

Print Name of Preparer (Person Who Completed the Form)

561-691-2118

Phone



Franchise Tax Account Status

As of: 06/12/2015 05:51:32 PM

This Page is Not Sufficient for Filings with the Secretary of State

BLUE SUMMIT WIND, LLC DBA BSW, LLC	
Texas Taxpayer Number	11137881576
Mailing Address	700 UNIVERSE BLVD C/O FEX/JB JUNO BEACH, FL 33408-2657
Right to Transact Business in Texas	ACTIVE
State of Formation	DE
Effective SOS Registration Date	09/01/2006
Texas SOS File Number	0800702870
Registered Agent Name	C T CORPORATION SYSTEM
Registered Office Street Address	1999 BRYAN ST., STE. 900 DALLAS, TX 75201

Wilbarger County continues to have a lower per capita personal income than the state as a whole. In terms of per capita income, Wilbarger County County's \$34,287 in 2009 ranked 99th among the 254 counties in Texas, while the Texas average was \$38,609 for the same period.

While some of these indicators are positive, the local economy in Wilbarger County is susceptible to adverse changes because of its relatively small population base. Wilbarger County will benefit from economic activity like that associated with the Blue Summit project. Major capital investments like this project are beneficial to the community on a number of fronts, including direct and indirect employment, expanded opportunities for existing businesses and increased local tax bases.

Board Finding Number 3.

The average salary level of qualifying jobs is expected to be at least \$48,000 per year. The review of the application by the State Comptroller's Office indicated that this amount—based on Texas Workforce Commission data—complies with the requirement that qualifying jobs must pay 110 percent of the regional average manufacturing wage. Blue Summit indicates that total employment will be approximately three (3) new jobs, all of which will be qualifying jobs.

In support of Finding 3, the economic impact evaluation states:

After construction, the project will create three new jobs when fully operational. All three jobs will meet the criteria for qualifying jobs as specified in Tax Code Section 313.021(3). According to the Texas Workforce Commission (TWC), the regional manufacturing wage for the NORTEX Regional Planning Commission Region, where Wilbarger County is located was \$38,153 in 2010. The annual average manufacturing wage for 2011 for Wilbarger County is \$42,224. That same year, the county annual average wage for all industries was \$31,564. In addition to a salary of \$48,000, each qualifying position will receive the following benefits: medical, dental and vision insurance coverage; paid holidays; paid vacations; pension; 401(k); short and long term disability; life insurance; sick time/sickness in family time; education assistance; and flexible spending accounts.

Checklist Item 14 - Wage Information

110% of Wilbarger County Average Weekly Wage for All Jobs

2011 Q1	582				
2011 Q2	563				
2011 Q3	619				
2011 Q4	<u>664</u>				
	607	x	110%	\$	667.70

110% of Wilbarger County Average Weekly Wage for Manufacturing Jobs

2011 Q1	741				
2011 Q2	718				
2011 Q3	866				
2011 Q4	<u>921</u>				
	812	x	110%	\$	892.65

110% of NORTEX Average Annual Wage for Manufacturing Jobs

$$38,153 \times 110\% = \$ 41,968.30$$

110% of NORTEX Average Weekly Wage for Manufacturing Jobs

$$38,153 \div 52 \text{ weeks} \times 110\% = 807.08$$



LMCI TRACER | The Future | Career Resources | Texas Labor Market | Data Link



Quarterly Employment and Wages (QCEW)

[Restart](#) [Back](#) [Print](#) [Download](#)

[Help with Download](#)

[LMCI Searchpage](#)

[Data Link](#)

[Wage Information](#)

[The Future](#)

[Career & Economic Dev Resource](#)

[LMCI Publications](#)

[Resources](#)

Page 1 of 1 (40 results/page)

Year	Period	Area	Ownership	Division	Level	Ind Code	Industry	Avg Weekly Wages
2011	1st Qtr	Wilbarger County	Private	00	0	10	Total, All Industries	\$582
2011	2nd Qtr	Wilbarger County	Private	00	0	10	Total, All Industries	\$563
2011	3rd Qtr	Wilbarger County	Private	00	0	10	Total, All Industries	\$619
2011	4th Qtr	Wilbarger County	Private	00	0	10	Total, All Industries	\$664

Select Data Type

All Data Types

Unemployment (LAUS)

Employment Estimates (CES)

Quarterly Employment and Wages (QCEW)

Wages by Profession

Projections - Occupation

Projections - Industry

Consumer Price Index

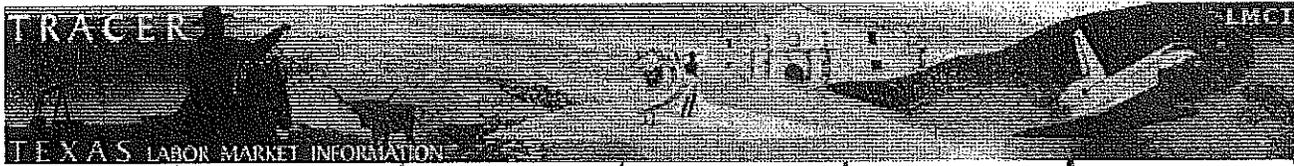
Income

Staffing Patterns

Population

[LMI Home](#) | [Site Map](#) | [Feedback](#) | [Help](#) | [About LMI](#) | [Privacy Policy](#) | [Terms of Use](#)
[TWC Home](#)





Quarterly Employment and Wages (QCEW)

[Restart](#)
[Back](#)
[Print](#)
[Download](#)

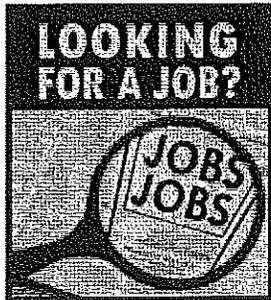
[Help with Download](#)

Page 1 of 1 (40 results/page)

Year	Period	Area	Ownership	Division	Level	Ind Code	Industry	Avg Weekly Wages
2011	1st Qtr	Wilbarger County	Private	31	2	31-33	Manufacturing	\$741
2011	2nd Qtr	Wilbarger County	Private	31	2	31-33	Manufacturing	\$718
2011	3rd Qtr	Wilbarger County	Private	31	2	31-33	Manufacturing	\$866
2011	4th Qtr	Wilbarger County	Private	31	2	31-33	Manufacturing	\$921

[LMI Home](#) |
 [Site Map](#) |
 [Feedback](#) |
 [Help](#) |
 [About LMI](#) |
 [Privacy Policy](#) |
 [Terms of Use](#)
[TWC Home](#)

- Select Data Type
- All Data Types
- Unemployment (LAUS)
- Employment Estimates (CES)
- Quarterly Employment and Wages (QCEW)
- Wages by Profession
- Projections - Occupation
- Projections - Industry
- Consumer Price Index
- Income
- Staffing Patterns
- Population



**2010 Manufacturing Wages by Council of Government Region
Wages for All Occupations**

COG	Wages	
	Hourly	Annual
Texas		
<u>1. Panhandle Regional Planning Commission</u>	\$18.60	\$38,683
<u>2. South Plains Association of Governments</u>	\$16.21	\$33,717
<u>3. NORTEX Regional Planning Commission</u>	\$18.34	\$38,153
<u>4. North Central Texas Council of Governments</u>	\$23.45	\$48,777
<u>5. Ark-Tex Council of Governments</u>	\$15.49	\$32,224
<u>6. East Texas Council of Governments</u>	\$17.63	\$36,672
<u>7. West Central Texas Council of Governments</u>	\$17.48	\$36,352
<u>8. Rio Grande Council of Governments</u>	\$15.71	\$32,683
<u>9. Permian Basin Regional Planning Commission</u>	\$19.90	\$41,398
<u>10. Concho Valley Council of Governments</u>	\$15.33	\$31,891
<u>11. Heart of Texas Council of Governments</u>	\$17.91	\$37,257
<u>12. Capital Area Council of Governments</u>	\$25.37	\$52,778
<u>13. Brazos Valley Council of Governments</u>	\$15.24	\$31,705
<u>14. Deep East Texas Council of Governments</u>	\$15.71	\$32,682
<u>15. South East Texas Regional Planning Commission</u>	\$27.56	\$57,333
<u>16. Houston-Galveston Area Council</u>	\$24.52	\$51,002
<u>17. Golden Crescent Regional Planning Commission</u>	\$20.07	\$41,738
<u>18. Alamo Area Council of Governments</u>	\$17.28	\$35,952
<u>19. South Texas Development Council</u>	\$13.27	\$27,601
<u>20. Coastal Bend Council of Governments</u>	\$21.55	\$44,822
<u>21. Lower Rio Grande Valley Development Council</u>	\$14.35	\$29,846
<u>22. Texoma Council of Governments</u>	\$18.10	\$37,651
<u>23. Central Texas Council of Governments</u>	\$17.21	\$35,788
<u>24. Middle Rio Grande Development Council</u>	\$13.21	\$27,471

Source: Texas Occupational Employment and Wages

Data published: June 2011

Data published annually, next update will be June 2012.

Note: Data is not supported by the Bureau of Labor Statistics (BLS).

Wage data is produced from Texas OES data, and is not to be compared to BLS estimates.

Data intended for TAC 313 purposes only.