



## **BOARD MEETING AGENDA**

**June 20, 2023**

12:00 p.m. – CityPlace Building, 50 West Main Street, Rochester, NY 14614

- A. Call Meeting to Order
- B. Pledge of Allegiance
- C. Approval of Minutes – May 16, 2023 (p. 2)
- D. Public Comments
- E. Local Labor Monitoring Report – May 2023 - Kevin Loewke (p. 7)
- F. Local Labor Exemptions Report – May 2023 - Brian Lafountain (p. 9)
- G. Financial Report – May 2023 - Gregg Genovese (p. 10)
- H. Applications for Consideration
  - 1. Home Leasing LLC (p. 11)
- I. Project Modifications
  - 2. 125 Howell Street, LLC – Extension (p. 47)
  - 3. I-Square, LLC – Extension (p. 53)
  - 4. J.D & Sons – Extension (p. 60)
- J. Governance Committee Report – J. Popli (p. 66)  
Local Labor Policy - updates
- K. Executive Director – Discussion Items  
YAMTAP – Workforce Development Fund Request (p. 70)  
Dashboard (p. 80)
- L. Chair Burr – Discussion Items
- M. Adjourn Meeting

Next meeting: Tuesday, July 18, 2023



**BOARD MEETING MINUTES**  
**May 16, 2023**

Time & Place: 12:00 p.m. at City Place

Board Present: A. Burr, R. King, T. Milne, L. Bolzner, N. Jones, J. Alloco, J. Popli

Board Absent: None

Also Present: A. Liss, R. Finnerty, A. Clark, K. Loewke, R. Baranello, Esq., B. Lafountain

Chair Burr called the meeting to order at 12:00 p.m. and R. King led the board in the Pledge of Allegiance.

On motion by J. Popli, second by J. Alloco, all aye, minutes of the April 18, 2023 meeting were approved.

K. Loewke presented the local labor monitoring report for April 2023.

B. Lafountain presented the following verified exemptions April 2023:

1. **Mantisi Solar LLC** - One exemption related to the provision and installation of the agricultural fence and gates at the project site in Sweden, NY. The exempted contractor was Whitmore Fence Company from Dryden, NY. The exemption was based on the "Significant cost differentials in bids whereby use of local labor significantly increases the cost of the project" criteria. Cost differential was 80%
2. **Wolf Solar LLC** - One exemption related to the provision and installation of the agricultural fence and gates at the project site in Sweden, NY. The exempted contractor was Whitmore Fence Company from Dryden, NY. The exemption was based on the "Significant cost differentials in bids whereby use of local labor significantly increases the cost of the project" criteria. Cost differential was 80%
3. **Gannett Partners I, LLC** - One exemption related to the application / installation of the gypcrete cementious floor underlayment at the project site on Exchange Blvd in Rochester. The exempted contractor is Henderson Johnson Inc from Syracuse, NY. The exemption was based on the "No local labor available....." criteria.
4. **LiCycle North American Hub** - One exemption related to the provision of carpenters to do the framing for the concrete at the project site in Rochester. The Local #276 Carpenters was at full employment and does not have the manpower to fully staff the carpentry work, so Local #276 members from outside the local labor area supplied to supplement the workforce. The exemption was based on the "No local labor available..." criteria.

Another exemption was granted related to the provision of Ironworkers for the steel work at the project site in Rochester. Ironworkers Local #33 is unable to meet the staffing needs on the project, so additional Ironworkers from Local 6 in Buffalo and Local 60 in Syracuse will be utilized to supplement the workforce. The exemption was based on the "No local labor available..." criteria.

T. Milne requested the Governance Committee review the local labor policy with respect to the cost differential exemption.

A. Liss presented the financial report for April 2023.

Executive Director Liss presented the following projects for consideration:

**DeMarte Companies Inc.**

DeMarte Companies Inc. d/b/a Maris Systems Designs, designs and builds manufacturing equipment and robotics for the automotive, medical, energy and consumer markets. DeMarte is renovating an existing 25,000 sq. ft. building in the Town of Ogden. The \$1.2 million project will allow for continued growth and is projected to create 3 new FTEs over the next three years in addition to the existing 69 FTEs. The applicant is seeking approval of sales tax exemptions only. The Benefit/Incentive ratio is 53:1.

The applicant was represented by Eric DeMarte. The applicant confirmed awareness of the local labor policy and that exemptions must be requested 45 days in advance, and does not anticipate any local labor exemptions at this time.

The board considered the following resolution: RESOLUTION OF THE COUNTY OF MONROE INDUSTRIAL DEVELOPMENT AGENCY TAKING OFFICIAL ACTION TO (i) APPOINT DEMARTE COMPANIES INC. D/B/A MARIS SYSTEMS DESIGN OR A RELATED ENTITY FORMED OR TO BE FORMED (COLLECTIVELY, THE "COMPANY") AS ITS AGENT TO UNDERTAKE A CERTAIN PROJECT; (ii) PROVIDE FINANCIAL ASSISTANCE TO THE COMPANY IN THE FORM OF A SALES AND USE TAX EXEMPTION FOR PURCHASES AND RENTALS RELATED TO THE UNDERTAKING OF THE PROJECT; (iii) AUTHORIZE THE EXECUTION AND DELIVERY OF A PROJECT AGREEMENT AND RELATED DOCUMENTS; AND (iv) MAKE A DETERMINATION WITH RESPECT TO THE PROJECT PURSUANT TO SEQRA.

On motion by L. Bolzner, second by J. Alloco for inducement and final resolution approving a sales tax exemption, a roll call vote resulted as follows and the motion carried:

J. Popli	Yea	J. Alloco	Yea
L. Bolzner	Yea	R. King	Yea
T. Milne	Yea	A. Burr	Yea
N. Jones	Yea		

**ClearChoice Building NY, LLC**

ClearChoice Building NY, LLC, Inc., a real estate holding company, is constructing a new 30,000 sq. foot facility in the Town of Greece. This building will house Clear Choice Products, a manufacturer of ear molds for hearing devices, noise protection and musician in-ear monitors. The retail portion, Clear Choice Hearing and Balance, (21% of total budget) will also relocate here. The remaining space will be leased as office space. ClearChoice plans to create 7 new FTEs in addition to its existing 12 FTEs. The \$10.8 million project is seeking a real property tax abatement, mortgage recording tax and sales tax exemption. The Benefit/Incentive ratio is 9:1.

The applicant was represented by Christine Tirk. The applicant confirmed awareness of the local labor policy and that exemptions must be requested 45 days in advance, and does not anticipate any local labor

exemptions at this time. Ms. Baranello stated there were no comments at the public hearing which was held on May 11, 2023.

The board considered the following resolution: RESOLUTION OF THE COUNTY OF MONROE INDUSTRIAL DEVELOPMENT AGENCY (i) ACKNOWLEDGING THE PUBLIC HEARING HELD BY THE AGENCY ON MAY 11, 2023, WITH RESPECT TO A CERTAIN PROJECT BEING UNDERTAKEN BY CLEARCHOICE BUILDING NY, LLC, OR A RELATED ENTITY FORMED OR TO BE FORMED (THE "COMPANY"); (ii) MAKING A DETERMINATION WITH RESPECT TO THE PROJECT PURSUANT TO SEQRA; (iii) APPOINTING THE COMPANY AS AGENT OF THE AGENCY; (iv) AUTHORIZING FINANCIAL ASSISTANCE TO THE COMPANY IN THE FORM OF (A) A SALES AND USE TAX EXEMPTION FOR PURCHASES AND RENTALS RELATED TO THE ACQUISITION, CONSTRUCTION AND EQUIPPING OF THE PROJECT, (B) A PARTIAL MORTGAGE RECORDING TAX EXEMPTION FOR FINANCING RELATED TO THE PROJECT, AND (C) A REAL PROPERTY TAX ABATEMENT STRUCTURED THROUGH A PAYMENT-IN-LIEU-OF TAX AGREEMENT ("PILOT AGREEMENT"); AND (v) AUTHORIZING THE NEGOTIATION, EXECUTION AND DELIVERY OF A PROJECT AGREEMENT, LEASE AGREEMENT, LEASEBACK AGREEMENT, PILOT AGREEMENT AND RELATED DOCUMENTS WITH RESPECT TO THE PROJECT.

On motion by J. Alloco, second by N. Jones for inducement and final resolution approving a real property tax abatement, mortgage recording tax and sales tax exemptions, a roll call vote resulted as follows and the motion carried:

J. Popli	Yea	J. Alloco	Yea
L. Bolzner	Yea	R. King	Yea
T. Milne	Yea	A. Burr	Yea
N. Jones	Yea		

### **Rock Depot LLC**

Rock Depot, LLC, a real estate holding company, is constructing a new 35,000 sq. ft. facility in the Town of Gates. The main tenant will be Rydex Logistics, a new transportation company that specializes in local deliveries, cross docking and temporary storage of dry goods. Rock Depot, LLC plans to create 3 new FTEs. The \$3.9 million project is seeking a real property tax abatement, mortgage recording tax and sales tax exemptions. The Benefit/Incentive ratio is 9:1.

The applicant was represented by Roman Kshysyak and Dmitriy Solonichnyy. The applicant confirmed awareness of the local labor policy and that exemptions must be requested 45 days in advance, and does not anticipate any local labor exemptions at this time. Ms. Baranello stated there were no comments at the public hearing which was held on May 11, 2023.

The board considered the following resolution: RESOLUTION OF THE COUNTY OF MONROE INDUSTRIAL DEVELOPMENT AGENCY (i) ACKNOWLEDGING THE PUBLIC HEARING HELD BY THE AGENCY ON MAY 11, 2023, WITH RESPECT TO A CERTAIN PROJECT BEING UNDERTAKEN BY ROCK DEPOT LLC, OR A RELATED ENTITY FORMED OR TO BE FORMED (THE "COMPANY"); (ii) MAKING A DETERMINATION WITH RESPECT TO THE PROJECT PURSUANT TO SEQRA; (iii) APPOINTING THE COMPANY AS AGENT OF THE AGENCY; (iv) AUTHORIZING FINANCIAL ASSISTANCE TO THE COMPANY IN THE FORM OF (A) A SALES AND USE TAX EXEMPTION FOR PURCHASES AND RENTALS RELATED TO THE



ACQUISITION, CONSTRUCTION AND EQUIPPING OF THE PROJECT, (B) A PARTIAL MORTGAGE RECORDING TAX EXEMPTION FOR FINANCING RELATED TO THE PROJECT, AND (C) A REAL PROPERTY TAX ABATEMENT STRUCTURED THROUGH A PAYMENT-IN-LIEU-OF-TAX AGREEMENT ("PILOT AGREEMENT"); AND (v) AUTHORIZING THE NEGOTIATION, EXECUTION AND DELIVERY OF A PROJECT AGREEMENT, LEASE AGREEMENT, LEASEBACK AGREEMENT, PILOT AGREEMENT AND RELATED DOCUMENTS WITH RESPECT TO THE PROJECT.

On motion by J. Popli, second by L. Bolzner for inducement and final resolution approving a real property tax abatement, mortgage recording tax and sales tax exemptions, a roll call vote resulted as follows and the motion carried:

J. Popli	Yea	J. Alloco	Yea
L. Bolzner	Yea	R. King	Yea
T. Milne	Yea	A. Burr	Yea
N. Jones	Yea		

**Pittsford Canalside Properties LLC**

Pittsford Canalside Properties LLC, a real estate holding company, plans to construct a mixed-use development on 7.5 acres in the Village of Pittsford. The development will include a 156 unit apartment complex, clubhouse and restaurant facility along the Erie Canal. The apartments will range from \$1,300 for a studio up to \$3,200 for a three bedroom unit. 10% of the new units will be income restricted for qualifying households making 60% or less of the Rochester, NY metropolitan statistical area median household income. The site was part of the NYS Brownfield program and was successfully remediated including the removal of over 90,000 tons of soil. This site will feature public benefit and amenities including new public access points to the canal, sidewalks, gazebos, benches, landscaping and docks. The on-site restaurant will create 17 FTEs and the apartment complex will create 7 jobs. The \$53 million project is seeking a real property tax abatement, mortgage recording tax and sales tax exemptions. The Benefit/Incentive ratio is 8:1.

The applicant was represented by Chris DiMarzo and Tim Reidy. The applicant confirmed awareness of the local labor policy and that exemptions must be requested 45 days in advance. The applicant stated that the only local labor exemption they anticipate at this time is for Gypcrete. Ms. Baranello stated there were several comments at the public hearing which was held on May 11, 2023. All written comments and a link to the comments made at the recorded public hearing were distributed to the board.

The board considered the following resolution: RESOLUTION OF THE COUNTY OF MONROE INDUSTRIAL DEVELOPMENT AGENCY (i) ACKNOWLEDGING THE PUBLIC HEARING HELD BY THE AGENCY ON MAY 11, 2023, WITH RESPECT TO A CERTAIN PROJECT BEING UNDERTAKEN BY PITTSFORD CANALSIDE PROPERTIES LLC, OR A RELATED ENTITY FORMED OR TO BE FORMED (THE "COMPANY"); (ii) MAKING A DETERMINATION WITH RESPECT TO THE PROJECT PURSUANT TO SEQRA; (iii) APPOINTING THE COMPANY AS AGENT OF THE AGENCY; (iv) AUTHORIZING FINANCIAL ASSISTANCE TO THE COMPANY IN THE FORM OF (A) A SALES AND USE TAX EXEMPTION FOR PURCHASES AND RENTALS RELATED TO THE ACQUISITION, CONSTRUCTION AND EQUIPPING OF THE PROJECT, (B) A PARTIAL MORTGAGE RECORDING TAX EXEMPTION AND (C) A REAL PROPERTY TAX

ABATEMENT STRUCTURED THROUGH A PAYMENT-IN-LIEU-OF-TAX AGREEMENT ("PILOT AGREEMENT"); AND (v) AUTHORIZING THE NEGOTIATION, EXECUTION AND DELIVERY OF A PROJECT AGREEMENT, LEASE AGREEMENT, LEASEBACK AGREEMENT, PILOT AGREEMENT AND RELATED DOCUMENTS WITH RESPECT TO THE PROJECT.

On motion by J. Popli, second by N. Jones for inducement and final resolution approving a real property tax abatement, mortgage recording tax and sales tax exemptions, a roll call vote resulted as follows and the motion did not carry:

J. Popli	Yea	J. Alloco	Nay
L. Bolzner	Nay	R. King	Nay
T. Milne	Nay	A. Burr	Yea
N. Jones	Yea		

Executive Director Liss discussed the submission of a letter of intent for a Fast NY grant application for \$20,000,000 in infrastructure improvements to the site on Tebor Road in Webster.

Executive Director Liss informed the board that the staff is currently still collecting information from project applicants and anticipates that the 2022 PARIS report will be completed and submitted by June 1.

On motion by J. Alloco, second L. Bolzner, all aye, motion carried to adjourn the regular meeting.



## May 2023 Monthly C.O.M.I.D.A. Report

June 5<sup>th</sup> 2023,

1. This report covers our site visits between May 1<sup>st</sup>, 2023 and May 31<sup>st</sup>, 2023.
2. During this period Loewke Brill made 78 monthly site visits.
3. During this period Loewke Brill made "6" Follow up visits.
4. Loewke Brill checked for residence with 742 workers.
5. Of those workers, there were "16" non-compliant.
  - a. 13 – No proof of residence
    - i. 5/2/23 – Li-Cycle North America Hub, Inc – 1 from G&J no ID, 2 from QSI no ID, 2 from O'Connell electric no ID, 1 from Upstate Specialty Coatings no ID. All workers compliant on follow up visit 5/3/23
    - ii. 5/4/23 – University Ave, LLC – 1 from Brooks Brothers Painting no ID, compliant on follow up visit 5/5/23
    - iii. 5/8/23 – Aptitude Rochester, LLC – 1 from Lakeview Landscape no ID, compliant on follow up visit 5/9/23
    - iv. 5/8/23 – Whitney Housing I, LLC – 2 from Issac Siding no ID. 1 Compliant on follow up visit 5/9/23, 1 removed from project
    - v. 5/8/23 – Wolf Solar, LLC – 1 from Ironwood no ID, compliant with ID on follow up visit 5/9/23
    - vi. 5/16/23 – Li-Cycle North America Hub, Inc – 1 from TEC no ID, 1 from Upstate Specialty Coatings no ID. Both compliant with ID on follow up visit 5/17/23

b. 3 – Out of Area

i. 5/2/23 – Li-Cycle North America Hub, Inc – Brand Safway/TEC – 2 out of area. Out of area workers removed from site on follow up visit 5/3/23

ii. 5/16/23 – Li-Cycle North America Hub, Inc – 1 from LMC out of area. Removed from project

c. 0 – Invalid ID

6. USRE Manitou – Current Overall = 73.4% – Project subject to 70% overall compliance

7. As of May 31<sup>st</sup>, 2023 all monitored sites were in compliance at time of our inspection.

8. There were “0” new COMIDA sign(s) delivered

Big firm capability. Small firm personality.

# THE BONADIO GROUP

---

## CPAs, Consultants & More

### **June 2023 Verified Local Labor Exemption Report**

Board Meeting – June 2023

The following Verified Local Labor Exemption Requests were processed in May 2023

1. LiCycle North American Hub
  - a. One exemption related to the provision and installation of the lightning protection system at multiple buildings at the project site in Rochester. The exemption was based on the “No local labor available...” criteria.

## Statement of Financial Position

	Year To Date 05/31/2023	Year Ending 12/31/2022
	Actual	Actual
<b>Assets</b>		
Current Assets		
Cash and Cash Equivalents	9,516,153	10,551,290
Restricted Cash	4,508,282	4,765,270
Accounts Receivable, Net	51,846	82,197
Prepaid Expenses	66,737	115,681
Total Current Assets	14,143,018	15,514,438
Long-term Assets		
Property & Equipment	625,000	625,000
Other Long-term Assets	242,304	242,304
Total Long-term Assets	867,304	867,304
<b>Total Assets</b>	<b>15,010,322</b>	<b>16,381,742</b>
<b>Liabilities and Net Assets</b>		
Liabilities		
Short-term Liabilities		
Accounts Payable	45,503	17,878
Accrued Liabilities	259,091	951,536
Deferred Revenue	33,360	65,915
Other Short-term Liabilities	476	476
Total Short-term Liabilities	338,431	1,035,804
Long Term Liabilities	246,992	246,992
Total Liabilities	585,423	1,282,796
Net Assets		
Net Assets	15,098,945	8,846,166
Change In Net Assets	(674,047)	6,252,779
Total Net Assets	14,424,899	15,098,945
<b>Total Liabilities and Net Assets</b>	<b>15,010,322</b>	<b>16,381,742</b>

## Summary Statement of Activities - All Funds with Prior Year

	Year To Date 05/31/2023	Year To Date 05/31/2023	Year To Date 05/31/2022
	Actual	Budget	Actual
Revenue			
Fee Income	258,385	833,333	2,162,034
Interest Income	53,761	417	113
Grant Revenue - Governmental	0	200,500	0
Total Revenue	312,146	1,034,250	2,162,147
Payroll	118,301	129,125	168,382
Sponsorships	9,000	4,167	6,515
Program & Community Development	587,806	1,021,583	473,650
General & Administrative	271,086	253,104	262,083
Total Expenses	986,193	1,407,979	910,631
Change In Net Assets	(674,047)	(373,729)	1,251,517



## APPLICATION SUMMARY

**DATE:** June 20, 2023

**APPLICANT:**

Home Leasing, LLC  
75 S. Clinton Ave. Ste 700  
Rochester NY 14604

**PROJECT LOCATION:**

216-218, 220-222, 224-226 East Main Street  
5-7 North Clinton Ave  
Rochester, NY 14604

**PROJECT SUMMARY:**

Home Leasing, LLC proposes to purchase and renovate four buildings on the corner of Main Street and North Clinton Ave. in the City of Rochester. The ground floor will be commercial space with approximately 11 residential apartment units on the upper floors. All apartments will serve middle income households who earn 80% or less of AMI. This project is part of the Downtown Revitalization initiative and will transform the corner of Main Street and North Clinton Ave. and will be consistent with the East Main Street Downtown Historic District. At the request of the City of Rochester, the applicant is seeking approval of a Shelter Rent real property tax abatement agreement for both the residential and commercial space. Tenants have not yet been identified but the applicant expects that these spaces will generate new, local job opportunities for small businesses. The cost benefit ratio is 1:1.

**PROJECT AMOUNT:**

\$11,611,849

**JOBS: EXISTING:**  
**PROJECTED:**  
**REQUIRED**

0	FTEs
1	FTEs
1	FTEs

**PUBLIC HEARING DATE:**

June 20, 2023

**BENEFIT TO INCENTIVE RATIO:**

1:1

**SEQR:**

INTERNAL RENOVATIONS ONLY; SEQR PROCESS COMPLETE.

**ELIGIBILITY:**

NEW BUILDING CONSTRUCTION OR RENOVATION PROJECT FOR STUDENT/SENIOR/AFFORDABLE HOUSING

**APPROVED PURPOSE:**

STUDENT/SENIOR/AFFORDABLE HOUSING

# Monroe County Industrial Development Agency

## MRB Cost Benefit Calculator

Date June 20, 2023  
 Project Title Home Leasing, LLC  
 Project Location 0



## Economic Impacts

Summary of Economic Impacts over the Life of the PILOT

**Project Total Investment**

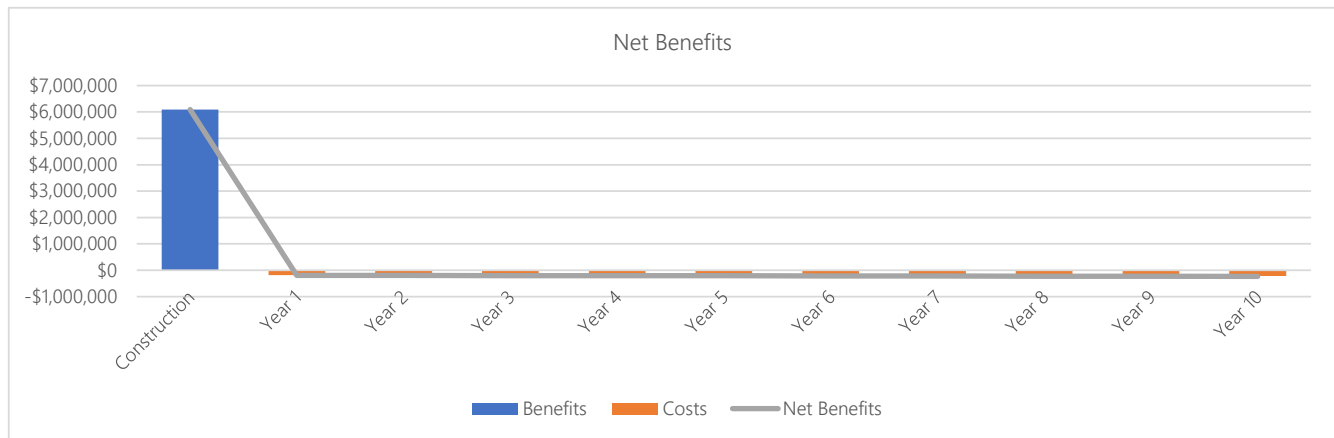
\$11,611,849

Temporary (Construction)			
	Direct	Indirect	Total
Jobs	39	32	71
Earnings	\$3,888,748	\$1,860,742	\$5,749,490
Local Spend	\$9,289,479	\$5,528,748	\$14,818,227

Ongoing (Operations)			
Aggregate over life of the PILOT			
	Direct	Indirect	Total
Jobs	0	0	0
Earnings	\$0	\$0	\$0

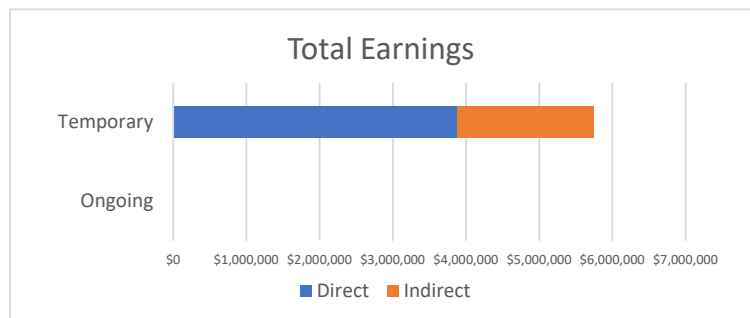
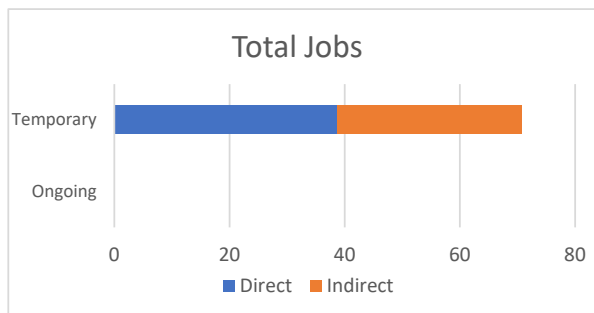
Figure 1



Net Benefits chart will always display construction through year 10, irrespective of the length of the PILOT.

Figure 2

Figure 3





## Fiscal Impacts



Cost-Benefit Analysis Tool powered by MRB Group

### Estimated Costs of Exemptions

	Nominal Value	Discounted Value*
Property Tax Exemption	\$7,448,645	\$5,270,035
Sales Tax Exemption	\$0	\$0
Local Sales Tax Exemption	\$0	\$0
State Sales Tax Exemption	\$0	\$0
Mortgage Recording Tax Exemption	\$0	\$0
Local Mortgage Recording Tax Exemption	\$0	\$0
State Mortgage Recording Tax Exemption	\$0	\$0
<b>Total Costs</b>	<b>\$7,448,645</b>	<b>\$5,270,035</b>

### State and Local Benefits

	Nominal Value	Discounted Value*
<b>Local Benefits</b>	<b>\$5,351,311</b>	<b>\$5,472,536</b>
<b>To Private Individuals</b>	<b>\$5,749,490</b>	<b>\$5,749,490</b>
Temporary Payroll	\$5,749,490	\$5,749,490
Ongoing Payroll	\$0	\$0
Other Payments to Private Individuals	\$0	\$0
<b>To the Public</b>	<b>(\$398,179)</b>	<b>(\$276,955)</b>
Increase in Property Tax Revenue	(\$438,426)	(\$317,201)
Temporary Jobs - Sales Tax Revenue	\$40,246	\$40,246
Ongoing Jobs - Sales Tax Revenue	\$0	\$0
Other Local Municipal Revenue	\$0	\$0
<b>State Benefits</b>	<b>\$298,974</b>	<b>\$298,974</b>
<b>To the Public</b>	<b>\$298,974</b>	<b>\$298,974</b>
Temporary Income Tax Revenue	\$258,727	\$258,727
Ongoing Income Tax Revenue	\$0	\$0
Temporary Jobs - Sales Tax Revenue	\$40,246	\$40,246
Ongoing Jobs - Sales Tax Revenue	\$0	\$0
<b>Total Benefits to State &amp; Region</b>	<b>\$5,650,285</b>	<b>\$5,771,509</b>

### Benefit to Cost Ratio

	Benefit*	Cost*	Ratio
Local	\$5,472,536	\$5,270,035	1:1
State	\$298,974	\$0	:1
<b>Grand Total</b>	<b>\$5,771,509</b>	<b>\$5,270,035</b>	<b>1:1</b>

\*Discounted at 2%

### Additional Comments from IDA

0

Does the IDA believe that the project can be accomplished in a timely fashion? Yes

**Motion By:** \_\_\_\_\_  
**Seconded By:** \_\_\_\_\_

**RESOLUTION**  
 (Home Leasing, LLC Project)  
 OSC Code 2602-23-013A

A regular meeting of the County of Monroe Industrial Development Agency (the "Agency"), was held at the Agency's Offices, 50 West Main Street, Rochester, New York 14614, on June 20, 2023 at 12:00 p.m.

After the meeting had been duly called to order, the Chair announced that among the purposes of the meeting was to consider and take action on certain matters pertaining to a certain Project more particularly described below.

RESOLUTION OF THE COUNTY OF MONROE INDUSTRIAL DEVELOPMENT AGENCY (i) ACKNOWLEDGING THE PUBLIC HEARING HELD BY THE AGENCY ON JUNE 20, 2023, WITH RESPECT TO A CERTAIN PROJECT (AS DEFINED BELOW) BEING UNDERTAKEN BY HOME LEASING, LLC, OR A RELATED ENTITY FORMED OR TO BE FORMED (COLLECTIVELY, THE "COMPANY"); (ii) MAKING A DETERMINATION WITH RESPECT TO THE PROJECT PURSUANT TO SEQRA (AS DEFINED BELOW); (iii) APPOINTING THE COMPANY AS AGENT OF THE AGENCY; (iv) AUTHORIZING FINANCIAL ASSISTANCE TO THE COMPANY IN THE FORM OF A REAL PROPERTY TAX ABATEMENT STRUCTURED THROUGH A PAYMENT-IN-LIEU-OF-TAX AGREEMENT ("PILOT AGREEMENT"); AND (v) AUTHORIZING THE NEGOTIATION, EXECUTION AND DELIVERY OF A PROJECT AGREEMENT, LEASE AGREEMENT, LEASEBACK AGREEMENT, PILOT AGREEMENT AND RELATED DOCUMENTS WITH RESPECT TO THE PROJECT.

WHEREAS, by Title I of Article 18-A of the General Municipal Law of the State of New York, as amended and Chapter 55 of the Laws of 1972 of the State of New York (collectively, the "Act"), the Agency was created with the authority and power among other things, to assist with the acquisition of certain industrial development projects as authorized by the Act; and

WHEREAS, **HOME LEASING, LLC**, a New York limited liability company for itself or a related entity formed or to be formed (collectively, the "Company") has requested that the Agency assist with a certain Project (the "Project"), consisting of: (A) the acquisition of a leasehold interest in an aggregate approximately 0.12-acre parcel of land located at 216-218, 220-222 and 224-226 East Main Street and 5-7 North Clinton Avenue, all in the City of Rochester, New York 14604 and all other lands in the City of Rochester where, by license or easement or other agreement, the Company or its designees are making improvements that benefit the Project (collectively, the "Land") together with the four existing commercial buildings located thereon (the "Existing Improvements"); (B) the renovation and rehabilitation of the Existing Improvements into a mixed-use facility, consisting of ground-floor commercial space and approximately 11 residential apartment units located on the upper floors, with such units restricted for qualifying households earning 80% or less of the area median income (the "Improvements"); and (C) the acquisition and installation therein, thereon or thereabout of

certain machinery, equipment and related personal property including on-site laundry, air conditioning and new appliances (the "Equipment" and, together with the Land, the Existing Improvements and the Improvements, the "Facility"); and

WHEREAS, the Act authorizes and empowers the Agency to promote, develop, encourage and assist projects such as the Facility and to advance the job opportunities, health, general prosperity and economic welfare of the people of the State of New York; and

WHEREAS, pursuant to Section 859-a of the Act, on Tuesday, June 20, 2023 at 10:00 a.m., local time, at the Agency's offices, 50 West Main Street, Rochester, New York 14614, the Agency held a public hearing with respect to the Project and the proposed Financial Assistance (as defined below) being contemplated by the Agency, whereat interested parties were provided a reasonable opportunity, both orally and in writing, to present their views; and

WHEREAS, it is contemplated that the Agency will (i) negotiate a project agreement (the "Project Agreement"), pursuant to which the Agency will appoint the as its agent for the purpose of undertaking the Project, (ii) negotiate and enter into a lease agreement (the "Lease Agreement"), leaseback agreement (the "Leaseback Agreement") and payment-in-lieu-of-tax agreement (the "PILOT Agreement") with the Company and (iii) provide financial assistance (the "Financial Assistance") to the Company in the form of a partial real property tax abatement structured through the PILOT Agreement; and

WHEREAS, the Company has agreed to indemnify the Agency against certain losses, claims, expenses, damages and liabilities which may arise in connection with the transactions contemplated by the lease of the Facility; and

WHEREAS, pursuant to the New York State Environmental Quality Review Act, Article 8 of the Environmental Conservation Law and the regulations adopted pursuant thereto at 6 N.Y.C.R.R. Part 617, as amended (collectively referred to as "SEQRA"), the Agency must satisfy the applicable requirements set forth in SEQRA, as necessary, prior to making a final determination whether to undertake the Project.

NOW, THEREFORE, BE IT RESOLVED by the County of Monroe Industrial Development Agency as follows:

Section 1. The Company has presented an application in a form acceptable to the Agency. Based upon the representations made by the Company to the Agency in the application and other correspondence submitted by the Company to the Agency, the Agency hereby finds and determines that:

(a) By virtue of the Act, the Agency has been vested with all powers necessary and convenient to carry out and effectuate the purposes and provisions of the Act and to exercise all powers granted to it under the Act; and

(b) The Facility constitutes a "project", as such term is defined in the Act; and

(c) It is desirable and in the public interest for the Agency to appoint the Company as its agent for purposes of undertaking the Project; and

(d) The action to be taken by the Agency will induce the Company to undertake the Project, thereby increasing employment opportunities in Monroe County and otherwise furthering the purposes of the Agency as set forth in the Act; and

(e) The Project will not result in the removal of a civic, commercial, industrial, or manufacturing plant of the Company or any other proposed occupant of the Project from one area of the State of New York (the "State") to another area of the State or result in the abandonment of one or more plants or facilities of the Company or any other proposed occupant of the Project located within the State; and the Agency hereby finds that, based on the Company's application, to the extent occupants are relocating from one plant or facility to another, the Project is reasonably necessary to discourage the Project occupants from removing such other plant or facility to a location outside the State and/or is reasonably necessary to preserve the competitive position of the Project occupants in their respective industries; and

(f) Pursuant to SEQRA, the Project constitutes a "Type II Action" as said term is defined in SEQRA, and therefore no further action is required to be taken under SEQRA.

Section 2. The Agency hereby approves the cost/benefit report submitted by the Company listing the proposed cost/benefits of the Project.

Section 3. Subject to the Company executing the Project Agreement and the delivery to the Agency of a binder, certificate or other evidence of liability insurance policy for the Project satisfactory to the Agency, the Agency hereby authorizes the Company to proceed with the acquisition, construction and equipping of the Project and hereby appoints the Company as the true and lawful agent of the Agency to acquire, renovate and equip the Facility, and such appointment includes the following activities as they relate to the construction, renovation, erection, completion, use, repair and maintenance of the Improvements and the purchase, use, lease, placement, installation, repair, maintenance and replacement of the Equipment, whether or not any materials or supplies described below are incorporated into or become an integral part of the Improvements or the Equipment: (i) all purchases, leases, rentals and other uses of tools, machinery and equipment in connection with acquiring, renovating, equipping, repairing and maintaining the Facility, (ii) all purchases, rentals, uses or consumption of supplies, materials and services of every kind and description in connection with acquiring, renovating, equipping, repairing and maintaining the Facility, and (iii) all purchases, leases, rentals and uses of equipment, machinery, and other tangible personal property (including installation costs with respect thereto), installed or placed in, upon or under the Improvements, Land or the Equipment, including all repairs, maintenance and replacement of all such property. Said agents are authorized to make, execute, acknowledge and deliver any contracts, orders, receipts, writings and instructions, as the stated agents for the Agency, and in general to do all things which may be requisite or proper for completing the Facility, all with the same powers and with the same validity as the Agency could do if acting on its own behalf. As agent of the Agency, the Company is authorized to delegate such agency, in whole or in part, to agents, subagents, contractors, subcontractors, contractors and subcontractors of such agents and subagents and to such other parties as the Company chooses. The Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency are authorized and directed to execute and deliver to said agent an appropriate letter on Agency letterhead describing the authority granted under this resolution.

Section 4. Based upon the representation and warranties made by the Company in its application for financial assistance, the Agency hereby authorizes and approves a partial real property tax abatement.

Section 5. The form and substance of the Lease Agreement, the Leaseback Agreement and the PILOT Agreement (each in substantially the forms presented to the Agency and which, prior to the execution and delivery thereof, may be redated) are hereby approved.

Section 6. The Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency are hereby authorized, on behalf of the Agency, to negotiate and execute (A) the Lease Agreement whereby the Company leases the Project to the Agency, (B) the related Leaseback Agreement conveying the Project back to the Company, and (C) the PILOT Agreement; provided, that, (i) the rental payments under the Leaseback Agreement include payments of all costs incurred by the Agency arising out of or related to the Project and indemnification of the Agency by the Company for actions taken by the Company and/or claims arising out of or related to the Project; and (ii) the terms of the PILOT Agreement are consistent with the Agency's Uniform Tax Exemption Policy or the procedures for deviation have been complied with.

Section 7. The Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency are hereby authorized, on behalf of the Agency, to execute and deliver any mortgage, assignment of leases and rents, security agreement, UCC-1 Financing Statements and all documents reasonably contemplated by these resolutions or required by any lender identified by the Company (the "Lender") up to a maximum principal amount necessary to undertake the Project, acquire the Facility and/or finance or refinance equipment and other personal property and related transactional costs (hereinafter, with the Lease Agreement, Leaseback Agreement and PILOT Agreement are collectively referred to as, the "Agency Documents"); and, where appropriate, the Secretary or Assistant Secretary of the Agency is hereby authorized to affix the seal of the Agency (if any) to the Agency Documents and to attest the same, all with such changes, variations, omissions and insertions as the Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency shall approve, the execution thereof by the Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency to constitute conclusive evidence of such approval; provided in all events recourse against the Agency is limited to the Agency's interest in the Project.

Section 8. The Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency are hereby authorized and directed for and in the name and on behalf of the Agency to do all acts and things required and to execute and deliver all such certificates, instruments and documents, to pay all such fees, charges and expenses and to do all such further acts and things as may be necessary or, in the opinion of such Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency acting, desirable and proper to effect the purposes of the foregoing resolutions and to cause compliance by the Agency with all of the terms, covenants and provisions of the documents executed for and on behalf of the Agency.

Section 9. This resolution shall take effect immediately.

The question of the adoption of the foregoing Resolution was duly put to vote on roll call, which resulted as follows:

	<u><i>Yea</i></u>	<u><i>Nay</i></u>	<u><i>Absent</i></u>	<u><i>Abstain</i></u>
Jay Popli				
Troy Milne				
Lisa Bolzner				
Joseph Alloco				
Rhett King				
Norman Jones				
Ann L. Burr				

The Resolutions were thereupon duly adopted.

STATE OF NEW YORK )  
COUNTY OF MONROE ) ss.:

I, the undersigned Executive Director of the County of Monroe Industrial Development Agency, DO HEREBY CERTIFY:

That I have compared the annexed extract of the minutes of the meeting of the County of Monroe Industrial Development Agency (the "Agency"), including the resolutions contained therein, held on June 20, 2023, with the original thereof on file in my office, and that the same is a true and correct copy of the proceedings of the Agency and of such resolutions set forth therein and of the whole of said original insofar as the same related to the subject matters therein referred to.

I FURTHER CERTIFY that public notice of the time and place of said meeting was duly given to the public and the news media in accordance with Sections 103 and 104 of the New York Public Officers Law (Open Meetings Law) that all members of the Agency had due notice of the meeting and that the meeting was in all respects duly held.

IN WITNESS WHEREOF, I have hereunto set my hand on this 20<sup>th</sup> day of June, 2023.

---

Ana J. Liss, Executive Director



## APPLICATION FOR ASSISTANCE

Each applicant seeking assistance must complete this application and provide required supplemental forms/documentation.

Please answer all questions. Use "None" or "Not Applicable" where necessary. Information in this application may be subject to public review under New York State Law, except for information that is considered deniable by the Freedom of Information Law. This form is available at [www.monroecountybusiness.org/application](http://www.monroecountybusiness.org/application).

Please send completed application via email to [EconomicDevelopment@monroecounty.gov](mailto:EconomicDevelopment@monroecounty.gov). A **non-refundable** application fee of \$350.00 is required. Please see page 12 for additional information on costs and fees.

### I. APPLICANT

#### A. Applicant Information

Name: Home Leasing, LLC  
Address: 75 S Clinton Ave, Ste. 700  
City/State/Zip: Rochester, NY 14604  
Tax Id No.: 74-3109665  
Contact Name: Bret Garwood  
Title: CEO  
Telephone: 585-287-5786  
E-Mail: bretga@homeleasing.net

#### B. Applicant's Legal Counsel

Name: Lauren Gannon  
Firm: Cannon, Heyman & Weiss, LLP  
Address: 726 Exchange St, Ste. 500  
City/State/Zip: Buffalo, NY 14210  
Telephone: 716-800-8721  
Email: lgannon@chwattys.com

#### C. Owners of Applicant Company (must total 100%). If an LLC, LP or similar, all members/partners must be listed

Name (see attached "Schedule A")	%	Corporate Title
<u></u>	<u>%</u>	<u></u>
<u></u>	<u>%</u>	<u></u>
<u></u>	<u>%</u>	<u></u>
<u></u>	<u>%</u>	<u></u>
<u></u>	<u>%</u>	<u></u>
<u></u>	<u>%</u>	<u></u>
<u></u>	<u>%</u>	<u></u>
<u></u>	<u>%</u>	<u></u>
<u></u>	<u>%</u>	<u></u>
<u></u>	<u>%</u>	<u></u>
<u></u>	<u>%</u>	<u></u>



## II. PROJECT

### A. Address of proposed project facility

Address: Multiple (see attached)

Tax Map Parcel Number: Multiple (see attached)

City/Town/Village: Rochester

School District: Rochester

Zip: 14604

Current Legal Owner of Property:

Multiple (see attached)

### B. Benefits Requested (Check all that apply)

- ☐ Sales Tax Exemption
- ☐ Mortgage Recording Tax Exemption
- ☒ Real Property Tax Abatement
- ☐ Industrial Revenue Bond Financing

### C. Description of project (check all that apply)

- ☐ New Construction
- ☒ Existing Facility
- ☒ Acquisition
- ☐ Expansion
- ☒ Renovation/Modernization
- ☐ Acquisition of machinery/equipment
- ☒ Other (specify) Adaptive Reuse

### D. Proposed User(s)/Tenant(s) of the Facility

If there are multiple Users/Tenants, please attach additional pages.

Are the user and owner related entities? ☐ Yes ☒ No

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Tax ID No: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Title: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

% of facility to be occupied by user/tenant \_\_\_\_\_

### E. Owners of User/Tenant Company (must total 100%)

If an LLC, LP or similar, all members/partners must be listed

Name	%	Corporate Title
_____	_____%	_____
_____	_____%	_____
_____	_____%	_____
_____	_____%	_____

### F. Project Timeline

Proposed Date of Acquisition: September 29, 2023

Proposed Commencement Date of Construction: 10/2/2023

Anticipated Completion Date: 2/1/2025

### G. Contractor(s)

Home Leasing Construction LLC

## II. PROJECT (cont'd)

**H. Would the project be undertaken without financial assistance from the Agency?** ☐ Yes ☒ No

Please explain why financial assistance is necessary.

The project involves the construction of 11 residential units with affordable rents regulated at 80% of the Area Median Income and the renovation of 4 commercial spaces that will provide below-market-rate commercial rents and be marketed to local and MWBE businesses. Home Leasing is proposing a PILOT of 10% of shelter rent for both residential and commercial uses. This financial assistance is necessary for two reasons:

- The commercial space will be supported by a master lease held by the project entity and the commercial spaces will be subleased to tenants. The PILOT will keep commercial rents affordable to attract small businesses.
- The PILOT makes the operating budget for the residential community feasible and predictable, which ensures affordability during the regulatory period.

The PILOT benefits the City and County as it will provide a steady stream of tax revenue over the life of the project.

**I. Are other facilities or related companies located within New York State?**

☐ Yes ☒ No

Location:

---



---

Will the Project result in the removal of an industrial or manufacturing plant of the Project occupant from one area of the state to another area of the state? ☐ Yes ☒ No

Will the Project result in the abandonment of one or more plants or facilities of the Project occupant located within the state?

☐ Yes ☒ No

If Yes to either question, explain how the Agency's Financial Assistance is required to prevent the Project from relocating out of the State, or is reasonably necessary to preserve the Applicant or User's competitive position in its respective industry:

---



---



---



---

**J. State Environmental Quality Review (SEQR) Act Compliance**

COMIDA, in granting assistance to the Applicant, is required to comply with the New York State Environmental Quality Review Act (SEQR).

Does the proposed project require discretionary permit, license or other type of approval by the state or local municipality?

- ☒ YES - Include a copy of any SEQR documents related to this Project including Environmental Assessment Form, Final Determination, Local Municipality Negative Declaration, etc.

☐ NO

## II. PROJECT (cont'd)

### K. DESCRIPTION OF THE PROJECT AND BACKGROUND ON USER(S) OF THE FACILITY

NAICS Code: 531110

Home Leasing is proposing a development project that will reimagine and revitalize the distressed but vital corner of East Main Street and North Clinton Avenue in downtown Rochester. The four buildings at the northwest corner of this prominent intersection —216-218, 220-222, 224-226 East Main Street and 5-7 North Clinton Avenue—will be rehabilitated into a beautiful, mixed-use asset that restores the historic fabric of this intersection and provides new affordable opportunities for downtown commercial and residential tenants. The project will remedy a long-standing blight that has prevented this area of the commercial corridor from thriving. Recognizing the visibility and importance of this project, Governor Hochul announced in December 2022 a \$4,000,000 award through the Downtown Revitalization Initiative (DRI), a substantial investment that makes this project possible.

The project will involve the rehabilitation and adaptive reuse of four historic commercial buildings into mixed use buildings with updated ground-floor commercial space and new residential space above. Presently, two of the commercial spaces are occupied but both businesses are leaving. The other commercial spaces and all upper floors are vacant and in various states of distress.

The new residential community will contain 11 apartments, and residential use will comprise approximately 12,873 square feet including shared common areas. The 10 one-bedroom and 1 two-bedroom apartments (approximately 10,553 square feet) will be regulated to serve middle-income households who earn up to 80% of Area Median Income (AMI). The new residential use will generate two new part-time property management jobs (community leader and maintenance technician).

The ground floor commercial spaces will total approximately 3,905 square feet. Historically, there were five commercial spaces at ground level, but the project will involve combining the two smallest spaces at 220 and 222 East Main Street to create a total of four unique spaces. The project will also create two new openings in the party walls between 216-218, 220-222, and 224-226 East Main Street, which will provide the option for larger commercial spaces and better marketability to potential tenants. The commercial space will be available at affordable (below-market-rate) rental rates to generate economic and small business opportunities. Home Leasing will hold a master lease for all the commercial spaces and engage a commercial broker to assist with the vision to ensure the project attracts quality tenants that will further enhance the commercial corridor. Tenants have not yet been identified but the project expects that these spaces will generate new, local job opportunities for small businesses.

The careful rehabilitation on the 0.12-acre site will be consistent with the significance of the East Main Street Downtown Historic District. This includes preserving remaining architectural features, repairing and restoring detail lost to decades of neglect, and meeting strict rehabilitation standards set by the National Park Service in order to leverage state and federal historic tax credits. Residential amenities will include shared on-site laundry, and part-time property management and maintenance staff with an office in the neighborhood. All units will have central air-conditioning and appliances including dishwashers. The entire building, both residential and commercial uses, will be 100% electric.

MCROC Associates LLC was formed as owner of the project. This single-purpose, single-asset LLC will serve as the beneficial owner of the project through a nominee agreement with MC Associates Housing Development Fund Corporation (HDFC). The LLC will have a 99.99% Historic Tax Credit Investor Member (TBD) as well as a 0.01% managing member (MC Associates MM LLC) whose sole member is Home Leasing, LLC.

### III. PROPERTY TAX ABATEMENT/PAYMENT IN LIEU OF TAX AGREEMENT (PILOT)

Check One:

☐ **JOBSPLUS**

Requirements:

- Applicant must commit to a 10% increase in full-time equivalent employment, measured on the existing impacted employee base, over a 3 year period. The required number of jobs is \_\_\_\_\_.

☐ **LEASEPLUS**

Requirements:

- University and/or medical related facilities in which a 501(c)3 entity leases from a for-profit entity.
- Company must commit to a 10% increase in full-time equivalent employment, measured on the existing impacted employee base, over a 3 year period. The required number of jobs is \_\_\_\_\_.

☐ **ENHANCED JOBSPLUS**

Requirements:

- A minimum \$15 million investment **AND**
- A minimum of 100 new jobs

☐ **GREEN JOBSPLUS**

Requirements:

- LEED® Certification – Project must be rated as Certified, Gold, Silver or Platinum by the United States Green Building Council's Leadership in Energy and Environmental Design (LEED®) Green Building Rating System.
- Company must commit to a 10% increase in full-time equivalent employment, measured on the existing impacted employee base, over a 3 year period. The required number of jobs is \_\_\_\_\_.

☒ **SHELTER RENT**

For student housing or affordable housing projects.

☐ **Local Tax Jurisdiction Sponsored PILOT**

☐ **NO PROPERTY TAX ABATEMENT IS SOUGHT FOR THIS PROJECT**

#### IV. APPLICANT PROJECT COSTS

- A. Estimate the costs necessary for the construction, acquisition, rehabilitation, improvement and/or equipment of the project by the APPLICANT.

##### Building Construction or Renovation \*Estimates\*

- |              |       |           |
|--------------|-------|-----------|
| a. Materials | a. \$ | 3,895,432 |
| b. Labor     | b. \$ | 2,596,954 |

##### Site Work

- |   |       |           |
|---|-------|-----------|
| c. Materials                                  | c. \$ | _____     |
| d. Labor                                      | d. \$ | _____     |
| e. Non-Manufacturing Equipment                | e. \$ | _____     |
| f. Manufacturing Equipment                    | f. \$ | _____     |
| g. Equipment Furniture and Fixtures           | g. \$ | _____     |
| h. Land and/or Building Purchase              | h. \$ | 2,500,000 |
| i. Soft Costs (Legal, Architect, Engineering) | i. \$ | _____     |
| Other (specify) j. _____                      | j. \$ | _____     |
| k. _____                                      | k. \$ | _____     |
| l. _____                                      | l. \$ | _____     |
| m. _____                                      | m. \$ | _____     |

##### Total Project Costs (must equal Total Sources)

\$11,611,849

- B. Sources of Funds for Project Costs:

- |   |       |           |
|---|-------|-----------|
| a. Tax-Exempt Industrial Revenue Bond                 | a. \$ | _____     |
| b. Taxable Industrial Revenue Bond                    | b. \$ | _____     |
| c. Bank Financing                                     | c. \$ | 580,000   |
| d. Public Sources (City of Rochester and HCR PLP&CIF) | d. \$ | 1,825,000 |

Identify each state and federal grant/credit

NYSDERDA	44,000
RRP	1,000,000
Restore NY & DRI	4,710,000

- |                                  |           |
|----------------------------------|-----------|
| e. ESL Foundation via GRHP       | 424,000   |
| f. Equity (Historic Tax Credits) | 3,028,849 |

##### TOTAL SOURCES

(must equal Total Project Costs)

11,611,849

- C. Has the applicant made any arrangements for the financing of this project

☒ Yes ☐ No

If yes, please specify bank, underwriter, etc.

(see attached)

#### V. COMPLETE FOR EACH USER/TENANT THAT IS SEEKING SALES TAX EXEMPTIONS USER(S)/TENANT(S) PROJECT COSTS

Use additional sheets as necessary

Company Name \_\_\_\_\_

- A. Estimate the costs necessary for the construction, acquisition, rehabilitation, improvement, and/or equipping of the project by the user(s)/tenant(s) for which a sales tax exemption is requested.

##### Estimated Costs Eligible for Sales Tax Exemption Benefit

- |                                |       |       |
|--------------------------------|-------|-------|
| a. Materials                   | a. \$ | _____ |
| b. Labor                       | b. \$ | _____ |
| c. Non-Manufacturing Equipment | c. \$ | _____ |
| d. Manufacturing Equipment     | d. \$ | _____ |
| e. Furniture and Fixtures      | e. \$ | _____ |
| Other (specify): f. _____      | f. \$ | _____ |

g. \_\_\_\_\_ g. \$ \_\_\_\_\_

h. \_\_\_\_\_ h. \$ \_\_\_\_\_

i. \_\_\_\_\_ i. \$ \_\_\_\_\_

##### Total Project Costs

\$ \_\_\_\_\_

## VI. Value of Incentives

Project name: Home Leasing, LLC

26

### A. IDA PILOT Benefits:

Current Assessment	682,500
Dollar Value of New Construction & Renovation Costs	3,895,432
Estimated New Assessed Value of Project Subject to IDA	4,577,932

County Tax rate/\$1,000	8.29
Local Tax Rate* Tax Rate/\$1,000	
School Tax Rate /\$1,000	36.07
Total Tax Rate	44.36

PILOT Year	Gross Rent	Utilities	Net rent before vac	PILOT %	Total Before Benefit	Total PILOT Payment After
1	210,400	13,400	197,000	10%	203,077.06	19,700.00
2	214,608	13,802	200,806	10%	207,138.60	20,080.60
3	218,900	14,216	204,684	10%	211,281.38	20,468.41
4	223,278	14,643	208,636	10%	215,507.00	20,863.56
5	227,744	15,082	212,662	10%	219,817.14	21,266.19
6	232,299	15,534	216,764	10%	224,213.49	21,676.43
7	236,945	16,000	220,944	10%	228,697.76	22,094.43
8	241,683	16,480	225,203	10%	233,271.71	22,520.32
9	246,517	16,975	229,542	10%	237,937.15	22,954.24
10	251,447	17,484	233,964	10%	242,695.89	23,396.35
11	256,476	18,008	238,468	10%	247,549.81	23,846.79
12	261,606	18,549	243,057	10%	252,500.80	24,305.72
13	266,838	19,105	247,733	10%	257,550.82	24,773.29
14	272,175	19,678	252,496	10%	262,701.84	25,249.65
15	277,618	20,269	257,350	10%	267,955.87	25,734.96
16	283,171	20,877	262,294	10%	273,314.99	26,229.39
17	288,834	21,503	267,331	10%	278,781.29	26,733.10
18	294,611	22,148	272,463	10%	284,356.92	27,246.26
19	300,503	22,813	277,690	10%	290,044.05	27,769.04
20	306,513	23,497	283,016	10%	295,844.94	28,301.61
21	312,643	24,202	288,441	10%	301,761.83	28,844.14
22	318,896	24,928	293,968	10%	307,797.07	29,396.83
23	325,274	25,676	299,598	10%	313,953.01	29,959.83
24	331,780	26,446	305,334	10%	320,232.07	30,533.35
25	338,415	27,239	311,176	10%	326,636.71	31,117.58
26	345,184	28,057	317,127	10%	333,169.45	31,712.69
27	352,087	28,898	323,189	10%	339,832.84	32,318.88
28	359,129	29,765	329,364	10%	346,629.49	32,936.36
29	366,311	30,658	335,653	10%	353,562.08	33,565.33
30	373,638	31,578	342,060	10%	360,633.32	34,205.97

8,238,446.40 789,801.33

### B. Sales Tax Exemption Benefit:

Estimated value of Sales Tax exemption for faculty construction:

Estimated duration of Sales Tax exemption:

### C. Mortgage Recording Tax Exemption Benefit:

Estimated Value of Mortgage Recording Tax exemption:

### D. Industrial Revenue Bond Benefit

IRB inducement amount, if required:

### E. Percentage of Project Costs financed form Public Sector sources:

Total Value of Incentives:	7,448,645	64.15%
Sources of Funds (Section IV.B.)	11,611,849	

\*\* All estimates are based on current tax rates.

## VII. PROJECTED EMPLOYMENT

Complete for each Applicant or User/Tenant

**Company Name:** Home Leasing, LLC

**Applicant:** ☒ **or** **User/Tenant:** ☐

Applicant/Tenant creating jobs must submit most recent NYS-45 or equivalent.

	Current # of jobs at proposed project location or to be relocated to project location	IF FINANCIAL ASSISTANCE IS GRANTED – project the number of FTE and PTE jobs to be <b>RETAINED</b>	IF FINANCIAL ASSISTANCE IS GRANTED – project the number of FTE and PTE jobs to be <b>CREATED</b> upon THREE Years after Project completion	Estimate number of residents of the Labor Market Area in which the Project is located that will fill the FTE and PTE jobs to be created upon THREE Years after Project Completion **
Full time (FTE)	0	0	0	0
Part Time (PTE)	0	0	2	2
Total	0	0	1	1

\*\* For purposes of this question, please estimate the number of FTE and PTE jobs that will be filled, as indicated in the third column, by residents of the Labor Marker Area, in the fourth column. The Labor Marker Area includes: Monroe County, Orleans County, Genesee County, Wyoming County, Livingston County, Ontario County, Wayne County, Yates County, and Seneca County chosen at the Agency's discretion.

[Remainder of this Page Intentionally Left Blank]

## VIII. LOCAL LABOR

**To be completed by all Applicants and Users/Tenants of Projects which include the construction of new, expanded or renovated facilities:**

**Company Name** Home Leasing, LLC

**Applicant:** ☒ **and/or User/Tenant:** ☐

The County of Monroe Industrial Development Agency (IDA) was established for the purpose of creating employment opportunities for, and to promote the general prosperity and economic welfare of the residents of Monroe County. The IDA offers economic incentives and benefits to qualified applicants who wish to locate or expand their businesses or facilities in Monroe County. When the IDA approves a project, it enters into agreements to extend these incentives and benefits to the applicant.

Construction jobs are vital to the overall employment opportunities and economic growth in Monroe County. The IDA believes that companies benefiting from its incentive programs should employ local laborers, mechanics, craft persons, journey workers, equipment operators, truck drivers and apprentices ("construction workers"), during the construction phase of projects.

**AD**  
Initial **100% Local Labor**  
Applicants receiving IDA benefits **must** ensure that the it and/or its contractor/developer hire **100% of its construction workers from the local labor market.**

**AD**  
Initial **Local Labor Market**  
For the purpose of this policy, the local labor market is defined as construction workers residing in the following counties in New York State: Monroe, Genesee, Livingston, Orleans, Ontario, Seneca, Steuben, Wayne, Wyoming and Yates.

**AD**  
Initial **Bid Processing**  
Local participation in qualified projects receiving IDA economic incentives and benefits is vital to the economic growth of Monroe County. As such, all applicants/contractors/developers of a qualified project with a minimum \$5,000,000 investment must place any and all invitations to bid in the Builders Exchange of Rochester Plan Room (<https://robex.com/planroom/>) two weeks before the bids are due.

**AD**  
Initial **Monitoring**  
A third-party auditing firm ("Project Monitor") will be engaged to monitor construction work commencing on the date benefits are granted by resolution of the IDA Board.

Once approved for IDA benefits, all applicants will be required to provide to the Project Monitor and the Exemption Processor (as hereinafter defined) the following information:

1. Contact information for the applicant's representative who will be responsible and accountable for providing information about the bidding and awarding of construction contracts relative to the applicant's project; and
2. Description of the nature of construction jobs created by the project, including in as much detail as possible, the number, type and duration of construction positions.

All Monroe County IDA projects are subject to local monitoring by the IDA and the Project Monitor. Proof of residency or copy of drivers' license shall be checked by the Project Monitor during the Project Monitor's periodic inspection of the project.

The Project Monitor shall issue a report to the IDA staff immediately when an applicant or applicant's contractor is not in compliance with this labor policy. IDA staff shall advise the IDA Board of non-compliance by email or at the next scheduled meeting. If a violation of policy has occurred, the Project Monitor shall notify the applicant and contractor of such non-compliance and give applicant a warning of violation and 72 hours in which to correct such violation. Upon evidence of continued non-compliance or additional violations, the IDA and/or the Project Monitor shall notify the applicant that the project is in violation of the Monroe County IDA Labor Policy and is subject to IDA Board action which may result in the revocation, termination and/or recapture of any or all benefits conferred by the IDA.



**AD**

Initial

**Signage**

The applicant/contractor/developer of an IDA approved project shall be required to maintain a sign, provided by the Project Monitor, on the project site at all times during construction. This sign shall be located in an area that is accessible to onsite workers and visitors, which should be clear and legible.

**AD**

Initial

**Exemption Process**

In some instances, use of 100% local labor may not be possible for any of the following reasons:

- Warranty issues related to installation of specialized equipment whereby the manufacturer requires installation by only approved installers (a copy of the equipment warranty confirming the use of specific installers must be provided). The granting of an exemption for the use of non-local labor on warranty related grounds is expressly conditioned on either (i) said non-local sub-contractors being enrolled in a New York State certified apprenticeship program (proof of such enrollment shall be provided to the IDA upon request) or (ii) the hiring of an apprentice/apprentices or local construction laborer(s) to assist in the installation.
- Specialized construction is required and no local contractors or local construction workers have the required skills, certifications or training to perform the work (proof of communication with local contractors, or details of the specialized construction must be provided);
- Significant cost differentials in bids whereby use of local labor significantly increases the cost of the project. Three (3) bids are required and a cost differential of 25% is deemed significant. Where there is a significant cost differential, that if the local labor contractor agrees to reduce the bid to the average of the two bids, no waiver will be granted. However, if the average is still 25% or more, a waiver will be granted (copies of all bids/proposals received, including pricing, must be provided to confirm cost differential).
- No local labor available for the project (if local bids were solicited with no response, please provide a copy of the bid, explain how it was advertised, and list who the bids were requested from).

***The request to secure an exemption for the use of non-local labor must be received from the applicant on the exemption form provided by the IDA or the 3rd party exemption monitor (the "Exemption Processor") and received by the Exemption Process forty-five (45) days in advance of work commencing.*** The request will be reviewed by the Exemption Processor and forwarded to the IDA, at which time the IDA's Executive Director shall have the authority to approve or disapprove the exemption. The Exemption Processor shall report each authorized exemption to the Board of Directors at its monthly meeting.

The applicant has read the Labor Policy and agrees to adhere to it without changes and shall require its construction manager, general contractor and sub-contractors who are not exempt to acknowledge the same.

The foregoing terms have been read, reviewed and understood by the Applicant or User/Tenant and all appropriate personnel. Furthermore, the undersigned agrees and understands that the information contained herein must be transmitted and conveyed in a timely fashion to all applicable subcontractors, suppliers and materialman. Furthermore, the undersigned agrees to post and maintain a sign, provided by COMIDA, in a prominent, easily accessible location, identifying the project as a recipient of COMIDA assistance and the local labor requirements associated with this assistance.

Furthermore, the undersigned realizes that failure to abide by the terms herein could result in COMIDA revoking all or any portion of benefits it deems reasonable in its sole discretion for any violation hereof.

Home Leasing, LLC

(APPLICANT COMPANY)

(TENANT COMPANY)

Digitally signed by  
Adam Driscoll  
Date: 2023.05.24  
13:55:01 -04'00'

Authorized Sig. 5/24/2023

Signature , Title Date

Signature , Title Date

## IX. FEES

Transaction Type	Fees
Lease/Leaseback including any/all of the following: 1. PILOT Agreement 2. Sales and Tax Exemption* 3. Mortgage Tax Exemption	Application Fee: Non-refundable \$350.00 IDA Fee: 0.75% of the total project cost Legal Fee: 0.33% of the IDA fee. Minimum fee of \$4,000.
Sales Tax Exemption* and/or Mortgage Recording Tax Exemption	Application Fee: Non-refundable \$350.00 IDA Fee: 0.50% of the total project cost Legal Fee: 0.33% of the IDA fee. Minimum fee of \$4,000 if transaction includes mortgage recording tax exemption. Minimum fee of \$750 if transaction is sales tax exemption only.
Bond: Taxable or Tax-Exempt with Lease/Leaseback Including any/all of the following: 1. PILOT Agreement 2. Sales Tax Exemption* 3. Mortgage Tax Exemption	Application fee: Non-refundable \$350 IDA Fee: 1.25% of the total project cost Legal Fee: 0.33% of IDA fee Designated Bond Counsel fee is based on the complexity and amount of the transaction
Bond: Taxable or Tax-Exempt	Application fee: Non-refundable \$350 IDA Fee: 1.00% of the total project cost Legal fee: 0.33% of the IDA fee Designated Bond Counsel fee is based on the complexity and amount of the transaction.

\*If the sales tax benefits are required prior to closing, a non-refundable twenty-five percent (25%) of the IDA fee and Legal fees are payable at that time. This amount will be applied towards the IDA fee and Legal fee.

Home Leasing, LLC

(APPLICANT COMPANY)

Digitally signed by  
Adam Driscoll  
Date: 2023.06.09  
13:16:33 -04'00'

Authorized Signatory

5/24/2023

Signature, Title Date

(TENANT COMPANY)

Signature, Title Date


## X. CERTIFICATION

The undersigned company officer and/or user/tenant officer each hereby certifies, on behalf of the company and/or user/tenant, respectively (each singularly and together, the "Applicant"), as follows:

- A. The information contained in this Application, including employment information, is true and correct. The Applicant is aware that any material misrepresentation made in this Application constitutes an act of fraud, resulting in revocation of COMIDA benefits.
- B. The undersigned, on behalf of the Applicant, hereby certifies that the Applicant, and all parties which have ownership of the Applicant are current and will remain current on all real property, federal, state, sales, income and withholding taxes throughout the term of any agreements made in connection with this Application.
- C. Compliance with N.Y. GML Sec. 862(1): Applicant understands and agrees that the provisions of Section 862(1) of the New York General Municipal Law, as provided below, will not be violated if Financial Assistance is provided for the proposed Project:  
 § 862. Restrictions on funds of the agency. (1) No funds of the agency shall be used in respect of any project if the completion thereof would result in the removal of an industrial or manufacturing plant of the project occupant from one area of the state to another area of the state or in the abandonment of one or more plants or facilities of the project occupant located within the state, provided, however, that neither restriction shall apply if the agency shall determine on the basis of the application before it that the project is reasonably necessary to discourage the project occupant from removing such other plant or facility to a location outside the state or is reasonably necessary to preserve the competitive position of the project occupant in its respective industry.
- D. Compliance with Applicable Laws: The Applicant confirms and acknowledges that the owner, occupant, or operator receiving Financial Assistance for the proposed Project is in substantial compliance with applicable local, state and federal tax, worker protection and environmental laws, rules and regulations.
- E. False and Misleading Information: The Applicant confirms and acknowledges that the submission of any knowingly false or knowingly misleading information may lead to the immediate termination of any Financial Assistance and the reimbursement of an amount equal to all or part of any tax exemption claimed by reason of the Agency's involvement the Project.
- F. Recapture: Should the Applicant not expend as projected or hire as presented, the Agency may view such information/status as failing to meet the established standards of economic performance. In such events, some or all of the benefits taken by the Applicant will be subject to recapture.
- G. Pay Equity: The Applicant and/or user/tenant officer certifies on behalf of the company and/or user/tenant (the Applicant) has not been the subject of an adverse finding under the equal pay laws within the previous five years, has disclosed any pending equal pay claims against the company at time of application, and shall disclose to COMIDA any pending claims or adverse findings under the equal pay laws during the term of COMIDA financial assistance agreement.
- H. Applicant hereby releases the COMIDA ("Agency") from, agrees that the Agency shall not be liable for, and agrees to indemnify, defend and hold the Agency harmless from and against any and all liability arising from or expense incurred by (A) the Agency's examination and processing of, and action pursuant to or upon, this Application, regardless of whether or not this Application or the Project described herein or the tax exemptions and other assistance requested herein are favorably acted upon by the Agency; (B) the Agency's acquisition, construction, renovation and/or equipping of the Project described herein; and (C) any further action taken by the Agency with respect to the Project; including, without limiting the generality of the foregoing, all causes of action and attorneys' fees and any other expenses incurred in defending any suits or actions which may arise as a result of any of the foregoing. Applicant hereby understands and agrees, in accordance with Section 875(3) of the New York General Municipal Law, that any New York State and local sales and use tax exemption claimed by the Applicant and approved by the Agency in connection with the Project may be subject to recapture by the Agency under such terms and conditions as will be set forth in the Agent Agreement to be entered into by and between the Agency and the Applicant. The Applicant further represents and warrants that the information contained in this Application, including without limitation, information regarding the amount of New York State and local sales and use tax exemption benefits, is true, accurate and complete.

### APPLICANT COMPANY

Home Leasing, LLC

 Digitally signed by  
Adam Driscoll  
Date: 2023.06.09  
13:16:21 -04'00'

Authorized Signatory

5/24/2023

Signature

, Title

Date

### TENANT COMPANY

Signature

, Title

Date

# SCHEDULE A

## Schedule of Percentage Interest and Units of Members of Company

<b>Name</b>	<b>Units</b>	<b>% Total Interest</b>
Nelson B. Leenhouts	2.22	.7400%
Catherine Sperrick	63.34	21.1100%
Sarah Struzzi	18.33	6.1100%
Megan Houppert	18.33	6.1100%
Jeffrey Leenhouts	78.89	26.2963%
Colin P. Leenhouts	5	1.6667%
Matthew J. Leenhouts	5	1.6667%
Eric J. Leenhouts	5	1.6667%
Claire E. Leenhouts	5	1.6667%
Deborah Leenhouts	.31	.0010%
Linnea Shumway	32.86	10.9967%
Joshua Shumway	32.86	10.9967%
Samantha Shumway	32.86	10.9967%
<b>Total</b>	<b>300</b>	<b>100%</b>

## II. PROJECT

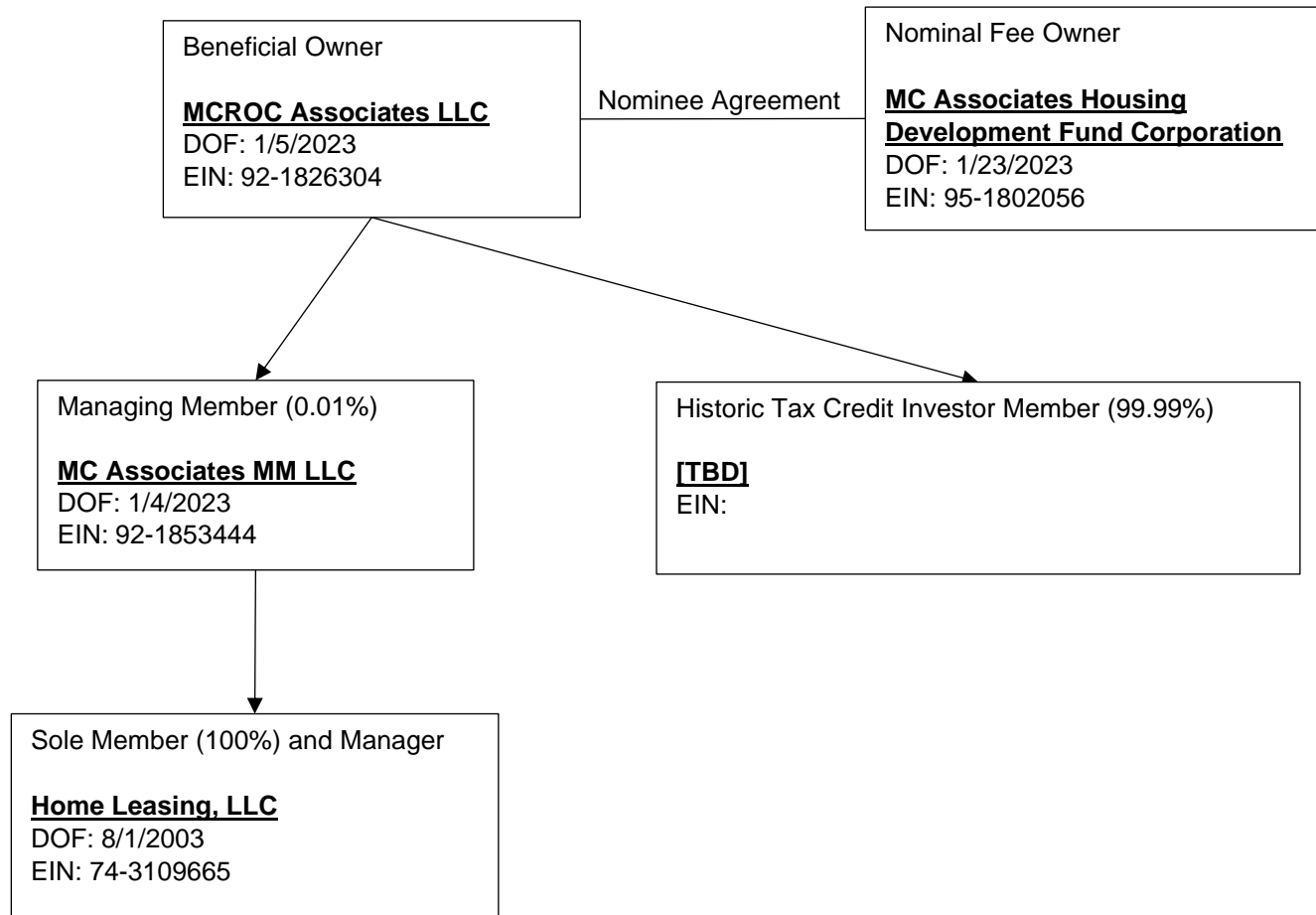
### A. Address of proposed project facility

Address	Tax Map Parcel Number	Current Legal Owner or Property
216-218 East Main Street	121.23-2-17	MC Associates HDfC
220-222 East Main Street	121.23-2-18	Hopwood LLC
224-226 East Main Street	121.23-2-19	Hopwood LLC
5-7 North Clinton Avenue	121.23-2-16	MC Associates HDfC

## IV. APPLICANT PROJECT COSTS

### C. Has the applicant made any arrangements for the financing of this project.

The project has secured \$4,000,000 in DRI, \$710,000 in RestoreNY, and \$424,000 from ESL Foundation. Home Leasing has discussed the project at length with NYS HCR and the Community Preservation Corporation and will be submitting applications for HCR's Small Building Participation Loan Program (PLP) subsidy and HCR's Community Investment Financing (CIF). Home Leasing has been in discussions with the City of Rochester for an allocation of ARP funds. It has also submitted an application for financial assistance from the Regional Redevelopment Partnership and has an application for NYSErDA incentives. Finally, Home Leasing submitted applications to the State Historic Preservation Office/National Park Service for an allocation of state and federal historic tax credits, the sale of which will bring equity to the project.

**E Main & N Clinton – Preliminary Organizational Chart**



## City of Rochester

Neighborhood and Business Development  
City Hall Room 125B, 30 Church Street  
Rochester, New York 14614-1290  
www.cityofrochester.gov

Division of Zoning

RECEIVED  
CITY OF ROCHESTER  
CLERK/COUNCIL OFFICE

2023 MAY 15 A 11:59

May 15, 2023

Home Leasing  
Attn. Adam Driscoll  
75 South Clinton Avenue, Ste 700  
Rochester, NY 14604

**Re: Site Plan Approval**  
**SP-17-22-23, 216-218, 220-222, 224-226 E Main Street and 5-7 N. Clinton Avenue**  
**CCD-M Center City District – Main Street**

Your site plan review application has been **APPROVED ON CONDITION**. This approval is based on the site plan, elevations, detail drawings dated April 28, 2023 and submitted May 2, 2023.

The following **CONDITIONS** must be met and, where appropriate, incorporated into the Building Permit drawings:

1. A resubdivision application to combine 216-218, 220-222, and 224-226 East Main Street, and 5-7 North Clinton Avenue must be submitted prior to the issuance of a Building Permit.
2. All refuse containers must be stored inside of the building and brought outside for pick-up only, to be returned inside of the building immediately following.

### **Project Description**

The four adjacent buildings located at 216-218, 220-222, and 224-226 East Main Street, and 5-7 North Clinton Avenue will be rehabilitated resulting in commercial space on the street level and 11 apartments on the upper floors. An addition will be constructed along the rear of 224-226 East Main Street that adds two stories to the currently existing two-story portion of the building adjacent to 5-7 North Clinton Avenue. The addition will be set back 10 feet from the public right-of-way along North Clinton Avenue and will connect and provide access between the buildings and bring light into the rear of the structures. It will be minimally visible from the public right-of-way. The applicant intends to combine all four parcels (resubdivide) into a single parcel after closing on their purchase and prior to their occupancy.

While not Designated Buildings of Historic Value and not being within a City of Rochester Historic Preservation District, these buildings are registered with the National Register of Historic Places as contributing resources to the East Main Street Historic District. Their rehabilitation is being performed under the auspices of the Historic Preservation Act. The intention is to rehabilitate the existing structures to preserve and/or recreate their historic appearance in accordance with the requirements of the NYS Historic Preservation Office. The historic preservation standards unsurprisingly deviate from CCD-M design guidelines, which were formulated primarily for new buildings and/or extensive façade changes to non-contributing existing buildings. Similarly, as existing, historically-contributing buildings, their bulk does not, and is not required to, comply with CCD-M building bulk requirements/guidelines.

All Mechanical, Electrical, and Plumbing (MEP) systems will be removed and replaced with new systems including a new sprinkler system. The existing 1.5" domestic water service and the existing Holley Main fire service will remain as they are sufficient to service this project. Refuse service will be traditional household toters, stored inside the building in an enclosed area in the lobby. The applicant has confirmed in writing there will be no storage of trash receptacles outside; a staff person of the complex will be responsible for placing the containers out for pick-up and returning them immediately after pick-up. Most of the long-existing encroachments of portions of



the facades will remain or be reduced. No parking is being provided as the district does not require its provision; the project is located on bus routes and the RTS Transit Center is nearby.

### **Approval Information**

**This document is not a permit.** Please refer to the “next steps in the permitting process” section below to complete the permitting process.

**This approval will EXPIRE on May 15, 2024.** You may request an extension of time in writing from the Manager of Zoning before the expiration date if one proves necessary.

### **Findings**

1. **Neighborhood Context.** The intersection of East Main Street and North Clinton Avenue is in the CCD-M district and is part of the downtown commercial center, which is primarily characterized by a mix of 19<sup>th</sup> and 20<sup>th</sup> century high-density commercial office buildings. These buildings are part of the East Main Street Historic District that runs along East Main Street between South Avenue and Chestnut Street. These buildings have long been vacant but have housed various businesses over the decades, which has resulted in multiple remodellings of their street-level façades. The rehabilitation of these structures to an historically-appropriate appearance will significantly increase their aesthetic appeal as well as that of the entire intersection.
2. **National Register of Historic Places.** Properties listed on the National Register of Historic Places have been evaluated on four criterion which were developed by United States Department of Interior, and are administered by the U.S. Secretary of State and the National Park Service. These criterion are listed below:

The quality of significance in American history, architecture, archaeology, engineering, and culture is present in districts, sites, buildings, structures, and objects that possess integrity of location, design, setting, materials, workmanship, feeling, and association, and:

- a. That are associated with events that have made a significant contribution to the broad patterns of our history; or
- b. That are associated with the lives of significant persons in or past; or
- c. That embody the distinctive characteristics of a type, period, or method of construction, or that represent the work of a master, or that possess high artistic values, or that represent a significant and distinguishable entity whose components may lack individual distinction; or that have yielded or may be likely to yield, information important in history or prehistory.

National Register records indicate that this district and/or the structures within it are notable for events that have occurred, and/or for architectural or engineering characteristics. The predominant architectural styles present are Beaux Arts and Mixed (having two or more styles from different periods). The period of significance of this district is noted to be between 1866 and 1973.

3. **SEQRA.** The site is somewhat near three sites of environmental concern. The first is a NYSDEC Brownfield Cleanup Site (BCP) Class 2 at the corner of Andrews Street and North Clinton Avenue that is currently actively being cleaned up; this site is hydraulically downgradient from the Clinton development site, sufficiently distant and would not impact the development site. Furthermore, the City is on supplied water and there is no risk of soil vapor intrusion from contaminants at the BCP site. The second, larger Andrews Street site was a City of Rochester site, and cleanup is complete. The third site, on Bittner Street, is old and appears to have stalled. Nothing about this site has been added on the NYSDEC site since 2011. That said, it is not a risk to the subject development site.

In accordance with Article 8 of the New York State Conservation Law and Chapter 48 of the Rochester City Code, this project was classified as a Type II Action and therefore no further review is required.



### **Next Steps**

#### **Submissions and Additional Approvals:**

1. **Final Drawings.** Three sets of final site drawings, and one digital copy, shall be submitted to the Zoning Office. One set will be retained in the Site Plan file, two sets will be stamped and transferred for Building Code review and issuance of building permits. Please contact Wes Grooms at (585) 428-6510 or [Wes.Grooms@Cityofrochester.gov](mailto:Wes.Grooms@Cityofrochester.gov).
2. **Certificate of Zoning Compliance (CZC).** The CZC will be issued upon submission of final drawings. To obtain a CZC please contact Wes Grooms at (585) 428-6510 or [Wes.Grooms@Cityofrochester.gov](mailto:Wes.Grooms@Cityofrochester.gov).
3. **Building Permits.** For building permits (site preparation, electric, plumbing, demolition, etc.), and Certificate of Occupancy. Please contact Casmic Reid at (585) 428-6643 or [Casmic.Reid@cityofRochester.gov](mailto:Casmic.Reid@cityofRochester.gov).
4. **DES Permits.** Any work in the public right-of-way (ROW) is subject to the review and approval by the DES Permit Office. For permitting related to the ROW, please contact Bre'Asia Griffin at (585) 428-7919 or [Breasia.Griffin@cityofrochester.gov](mailto:Breasia.Griffin@cityofrochester.gov).
5. **City Water Bureau.** Final engineered site plans shall be submitted to the City Water Bureau for review and approval. Please contact Michael Bushart at (585) 428-7567 or [Michael.Bushart@CityofRochester.gov](mailto:Michael.Bushart@CityofRochester.gov).
6. **Monroe County Pure Waters (MCPW).** Final sewer connection plans shall be submitted with the required PW-2 form (transmitted to you via e-mail on 4/3/2023) to MCPW for review and approval. Please contact Richard Bianchi at (585) 753-7614 or [rbianchi@monroecounty.gov](mailto:rbianchi@monroecounty.gov).
7. **Monroe County Department of Transportation (MCDOT).** Any changes or modifications to traffic regulation signs within the right-of-way requires approval by Monroe County Department of Transportation (MCDOT). Please contact Brent Penwarden at (585) 753-7733 or [bpenwarden@monroecounty.gov](mailto:bpenwarden@monroecounty.gov).

If you have any questions regarding this approval, please contact Wes Grooms at (585) 428-6510 or [Wes.Grooms@Cityofrochester.gov](mailto:Wes.Grooms@Cityofrochester.gov).

Sincerely,



Matthew Simonis  
 Manager of Zoning

cc: Matt Tomlinson, Marathon Engineering  
 Eric Schaaf, Marathon Engineering

## Short Environmental Assessment Form

### Part 1 - Project Information

#### Instructions for Completing

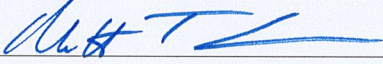
**Part 1 – Project Information.** The applicant or project sponsor is responsible for the completion of Part 1. Responses become part of the application for approval or funding, are subject to public review, and may be subject to further verification. Complete Part 1 based on information currently available. If additional research or investigation would be needed to fully respond to any item, please answer as thoroughly as possible based on current information.

Complete all items in Part 1. You may also provide any additional information which you believe will be needed by or useful to the lead agency; attach additional pages as necessary to supplement any item.

<b>Part 1 – Project and Sponsor Information</b>			
Name of Action or Project: E Main St & N Clinton St			
Project Location (describe, and attach a location map): 216-218, 220-222, 224-226 E Main Street, and 5-7 N Clinton St			
Brief Description of Proposed Action: Four adjacent buildings located on the northwest corner of Main Street and N Clinton Avenue will be rehabilitated resulting in commercial space on the street level, with 11 apartments across the upper three stories. This rehabilitation is being performed under the auspices of the Historic Preservation Act and seeks to restore these buildings in a manner that reflects their history as they are each a contributing resource to the East Main Historic District. The four existing tax parcels will be combined prior to occupancy; an Administrative Lot Combination will be submitted after Site Plan Approval has been granted and the developer closes on the properties.			
Name of Applicant or Sponsor: Adam Driscoll, Home Leasing		Telephone: 585-262-6210 E-Mail: adamdr@homeleasing.net	
Address: 75 S Clinton Ave, Ste 700			
City/PO: Rochester	State: NY	Zip Code: 14604	
1. Does the proposed action only involve the legislative adoption of a plan, local law, ordinance, administrative rule, or regulation? If Yes, attach a narrative description of the intent of the proposed action and the environmental resources that may be affected in the municipality and proceed to Part 2. If no, continue to question 2.		NO <input type="checkbox"/>	YES <input type="checkbox"/>
2. Does the proposed action require a permit, approval or funding from any other government Agency? If Yes, list agency(s) name and permit or approval: NYSHCR, DRI, Restore NY, City of Rochester, NYSEDA		NO <input type="checkbox"/>	YES <input checked="" type="checkbox"/>
3. a. Total acreage of the site of the proposed action? _____ 0.12 acres b. Total acreage to be physically disturbed? _____ 0 acres c. Total acreage (project site and any contiguous properties) owned or controlled by the applicant or project sponsor? _____ 0.12 acres			
4. Check all land uses that occur on, are adjoining or near the proposed action:			
5. <input checked="" type="checkbox"/> Urban <input type="checkbox"/> Rural (non-agriculture) <input type="checkbox"/> Industrial <input checked="" type="checkbox"/> Commercial <input type="checkbox"/> Residential (suburban) <input type="checkbox"/> Forest <input type="checkbox"/> Agriculture <input type="checkbox"/> Aquatic <input type="checkbox"/> Other(Specify): <input type="checkbox"/> Parkland			

5. Is the proposed action,	NO	YES	N/A
a. A permitted use under the zoning regulations?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Consistent with the adopted comprehensive plan?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6. Is the proposed action consistent with the predominant character of the existing built or natural landscape?	NO	YES	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
7. Is the site of the proposed action located in, or does it adjoin, a state listed Critical Environmental Area?	NO	YES	
If Yes, identify: _____	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
8. a. Will the proposed action result in a substantial increase in traffic above present levels?	NO	YES	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
b. Are public transportation services available at or near the site of the proposed action?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
c. Are any pedestrian accommodations or bicycle routes available on or near the site of the proposed action?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
9. Does the proposed action meet or exceed the state energy code requirements?	NO	YES	
If the proposed action will exceed requirements, describe design features and technologies:  <u>Project will meet the following standards: NYSEDA New Construction- Housing Program; and Energy Star Multifamily New Construction ERI Pathway</u>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
10. Will the proposed action connect to an existing public/private water supply?	NO	YES	
If No, describe method for providing potable water: _____	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
11. Will the proposed action connect to existing wastewater utilities?	NO	YES	
If No, describe method for providing wastewater treatment: _____	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
12. a. Does the project site contain, or is it substantially contiguous to, a building, archaeological site, or district which is listed on the National or State Register of Historic Places, or that has been determined by the Commissioner of the NYS Office of Parks, Recreation and Historic Preservation to be eligible for listing on the State Register of Historic Places?	NO	YES	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
b. Is the project site, or any portion of it, located in or adjacent to an area designated as sensitive for archaeological sites on the NY State Historic Preservation Office (SHPO) archaeological site inventory?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
13. a. Does any portion of the site of the proposed action, or lands adjoining the proposed action, contain wetlands or other waterbodies regulated by a federal, state or local agency?	NO	YES	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
b. Would the proposed action physically alter, or encroach into, any existing wetland or waterbody?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
If Yes, identify the wetland or waterbody and extent of alterations in square feet or acres: _____			
_____			
_____			



14. Identify the typical habitat types that occur on, or are likely to be found on the project site. Check all that apply:		
<input type="checkbox"/> Shoreline <input type="checkbox"/> Forest <input type="checkbox"/> Agricultural/grasslands <input type="checkbox"/> Early mid-successional <input type="checkbox"/> Wetland <input checked="" type="checkbox"/> Urban <input type="checkbox"/> Suburban		
15. Does the site of the proposed action contain any species of animal, or associated habitats, listed by the State or Federal government as threatened or endangered?	NO	YES
	<input checked="" type="checkbox"/>	<input type="checkbox"/>
16. Is the project site located in the 100-year flood plan?	NO	YES
	<input checked="" type="checkbox"/>	<input type="checkbox"/>
17. Will the proposed action create storm water discharge, either from point or non-point sources?	NO	YES
If Yes,	<input checked="" type="checkbox"/>	<input type="checkbox"/>
a. Will storm water discharges flow to adjacent properties?	<input type="checkbox"/>	<input type="checkbox"/>
b. Will storm water discharges be directed to established conveyance systems (runoff and storm drains)?	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, briefly describe:		
_____		
_____		
18. Does the proposed action include construction or other activities that would result in the impoundment of water or other liquids (e.g., retention pond, waste lagoon, dam)?	NO	YES
If Yes, explain the purpose and size of the impoundment: _____	<input checked="" type="checkbox"/>	<input type="checkbox"/>
_____		
19. Has the site of the proposed action or an adjoining property been the location of an active or closed solid waste management facility?	NO	YES
If Yes, describe: _____	<input checked="" type="checkbox"/>	<input type="checkbox"/>
_____		
20. Has the site of the proposed action or an adjoining property been the subject of remediation (ongoing or completed) for hazardous waste?	NO	YES
If Yes, describe: _____	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 nearby (non-adjacent) Sites are appx 0.17 miles away, One is Classified 2 (see below), one is Classified C; Complete		
<b>I CERTIFY THAT THE INFORMATION PROVIDED ABOVE IS TRUE AND ACCURATE TO THE BEST OF MY KNOWLEDGE</b>  Applicant/sponsor/name: Matt Tomlinson, Marathon Engineering, as Agent      Date: 2/17/23  Signature:  Title: Project Manager		

Classification Code: 2

This classification is assigned to a site at which:

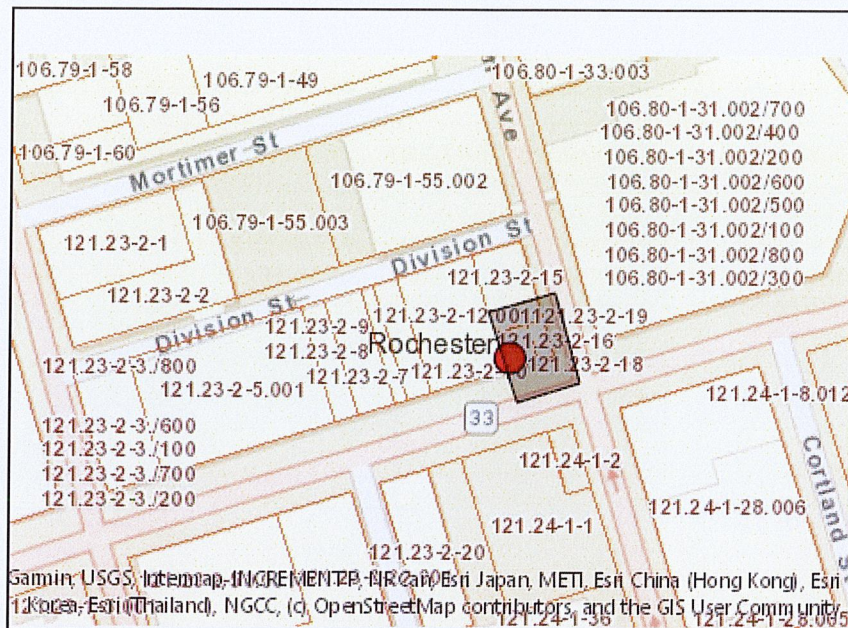
the disposal of hazardous waste has been confirmed and the presence of such hazardous waste or its components or breakdown products represents a significant threat to public health or the environment: or hazardous waste disposal has not been confirmed, but the site has been listed on the Federal National Priorities List (NPL).

**PRINT FORM**



## EAF Mapper Summary Report

Wednesday, January 25, 2023 5:22 PM



**Disclaimer:** The EAF Mapper is a screening tool intended to assist project sponsors and reviewing agencies in preparing an environmental assessment form (EAF). Not all questions asked in the EAF are answered by the EAF Mapper. Additional information on any EAF question can be obtained by consulting the EAF Workbooks. Although the EAF Mapper provides the most up-to-date digital data available to DEC, you may also need to contact local or other data sources in order to obtain data not provided by the Mapper. Digital data is not a substitute for agency determinations.



Gamin, USGS, Intelmap, INCREMENT, NRCAN, Esri Japan, METI, Esri China (Hong Kong), Esri India, Esri Korea, Esri (Thailand), NGCC, (c) OpenStreetMap contributors, and the GIS User Community

Part 1 / Question 7 [Critical Environmental Area]	No
Part 1 / Question 12a [National or State Register of Historic Places or State Eligible Sites]	Yes
Part 1 / Question 12b [Archeological Sites]	Yes
Part 1 / Question 13a [Wetlands or Other Regulated Waterbodies]	No
Part 1 / Question 15 [Threatened or Endangered Animal]	No
Part 1 / Question 16 [100 Year Flood Plain]	No
Part 1 / Question 20 [Remediation Site]	Yes





June 1, 2023

Ana Liss, Executive Director  
County of Monroe Industrial Development Agency  
50 West Main Street, Suite 1150  
Rochester, NY 14614

Re: Proposed PILOT/Harper's Corner (216-218, 220-222, & 224-226 E. Main St. & 5-7 N. Clinton Ave.)

Dear Ms. Liss: 

The City of Rochester received a request from Home Leasing, LLC on behalf of MCROC Associates LLC, to support a Special 10% Shelter Rent Payment in Lieu of Taxes (PILOT) agreement with COMIDA for the proposed acquisition and redevelopment of four buildings at the northwest corner of East Main Street and Clinton Avenue. The historic rehab project, named Harper's Corner, will create a mixed-use development with commercial and residential uses, including ten one-bedroom and one two-bedroom rental units, affordable to households earning at or below 80% of Area Median Income (AMI), and over 4,400 square feet of commercial space.

The Harper's Corner Project is in the East Main Street Downtown Historic District, and is one of the last remaining distressed or undeveloped corners in the area surrounding Midtown. The addresses and tax numbers are 216-218, 220-222, & 224-226 E. Main St. & 5-7 N. Clinton Ave., and 121.23-2-17, 121.23-2-18, 121.23-2-19, & 121.23.2-16, respectively. The project complements other major investments in the area, such as Sibley Square and the Commissary, The Linc, Cornerstone Park, and numerous infrastructure improvements along the adjacent section of East Main Street. The project is located in the City's Central City District – Main Street (CCD-M) district, and is consistent with the Zoning Code. The proposed project is consistent with the City of Rochester's Rochester 2034 Comprehensive Plan, Consolidated Community Development Plan, and Housing Policy.

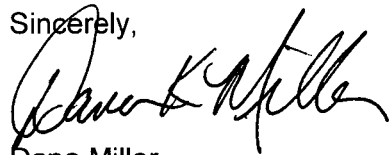
The total development cost of this mixed-use historic rehab is \$11.61 million. The project will be funded by a number of public sources including the New York State Downtown Revitalization Initiative (\$4 million), the NYS Small Building Participation Loan Program (\$825,000), and RestoreNY (\$710,000), as well as proceeds from the sale of Historic Tax Credits (\$3.03 million) and \$500,000 loan from the City of Rochester.

The City of Rochester supports this application for a Special 30-year 10% Shelter Rent PILOT for the Harper's Corner project, for consideration and approval by COMIDA. The PILOT is considered Special because the Shelter Rent tax abatement will be applied to the affordable housing rents as well as the commercial rent(s).



The City is in full support of this investment in our Center City and the economic impact it will have on the community. We look forward to continuing the City's partnership with Home Leasing, LLC.

Sincerely,

A handwritten signature in black ink, appearing to read "Dana Miller", written in a cursive style.

Dana Miller

Commissioner of Neighborhood and Business Development

xc:     Malik Evans, Mayor  
          Erik Frisch, Deputy Commissioner, Neighborhood and Business Development  
          Carol Wheeler, Manager of Housing  
          Bret Garwood, Chief Executive Officer, Home Leasing, LLC













## MODIFICATION SUMMARY

**DATE:** June 20, 2023

**APPLICANT:**

125 Howell Street, LLC  
100 Savannah Street  
Rochester, NY 14607

**PROJECT LOCATION:**

125 Howell Street  
Rochester, NY 14607

**MODIFICATION REQUEST:**

125 Howell Street, LLC is constructing five (5), market rate, four-story townhome rental units. Extensions of the sales tax exemptions were given in 2020 and 2021. The applicant is now seeking an extension of the sales tax exemption through December 31, 2025 because of price escalations and the pandemic.

**PROJECT AMOUNT**

ORIGINAL  
\$1,420,094

**Motion By:** \_\_\_\_\_  
**Seconded By:** \_\_\_\_\_

**RESOLUTION**  
 (125 Howell Street LLC Project)  
 OSC Code 2602-19-015D

A regular meeting of the County of Monroe Industrial Development Agency (the "Agency"), was held at the Agency's offices located at 50 West Main Street, Rochester, New York 14614, on June 20, 2023 at 12:00 p.m.

After the meeting had been duly called to order, the Chair announced that among the purposes of the meeting was to consider and take action on certain matters pertaining to a certain Project more particularly described below.

RESOLUTION OF THE COUNTY OF MONROE INDUSTRIAL DEVELOPMENT AGENCY (THE "AGENCY") AUTHORIZING THE EXTENSION OF THE SALES AND USE TAX EXEMPTION BENEFITS (AS HEREINAFTER DEFINED) GRANTED TO 125 HOWELL STREET LLC (THE "COMPANY") THROUGH DECEMBER 31, 2025, AND THE EXECUTION OF RELATED DOCUMENTS.

WHEREAS, by Title I of Article 18-A of the General Municipal Law of the State of New York, as amended and Chapter 55 of the Laws of 1972 of the State of New York (collectively, the "Act"), the Agency was created with the authority and power among other things, to assist with the acquisition of certain industrial development projects as authorized by the Act; and

WHEREAS, by Resolutions duly adopted on July 23, 2019 and December 21, 2021 (collectively, the "Resolution"), the Agency appointed **125 HOWELL STREET LLC**, a New York limited liability company, for itself or a related entity formed or to be formed (collectively, the "Company"), the true and lawful agent of the Agency to undertake a certain project (the "Project") consisting of: (A) the acquisition of a leasehold interest in an approximately 0.13-acre parcel of land located at 125 Howell Street in the City of Rochester, New York (the "Land"); (B) the construction on the Land of five (5) four-story townhomes, each containing approximately 1,750 square feet of space with two-bedrooms, two-bathrooms and parking located under the building on the ground floor (collectively, the "Improvements"); and (C) the acquisition and installation therein, thereon or thereabout of certain machinery, equipment and related personal property (the "Equipment" and, together with the Land and the Improvements, the "Facility"); and

WHEREAS, the Agency previously appointed the Company as its true and lawful agent to make purchases of goods and services relating to the Project that would otherwise be subject to New York State and local sales and use tax (the "Sales and Use Tax Exemption Benefits") through December 31, 2021; and

WHEREAS, the Company, pursuant to a certain Project Modification Request, dated November 15, 2021, requested the Agency grant an extension to the Sales and Use Tax Exemption Benefits through June 30, 2023; and

WHEREAS, the Company has, pursuant to a certain Project Modification Request, dated May 23, 2023, requested the Agency grant an extension to the Sales and Use Tax Exemption Benefits through December 31, 2025; and

WHEREAS, the Agency desires to adopt a resolution authorizing the extension of Sales and Use Tax Exemption Benefits to the Company and the execution and delivery of any documents necessary and incidental thereto.

NOW, THEREFORE, BE IT RESOLVED by the County of Monroe Industrial Development Agency as follows:

Section 1. Based upon the representation and warranties made by the Company in its request, the Agency hereby authorizes and approves the Company, as its agent, to continue to make purchases of goods and services relating to the Project and that would otherwise be subject to New York State and local sales and use tax through **December 31, 2025**. The Agency agrees to consider any requests by the Company for another extension or an increase to the amount of Sales and Use Tax Exemption Benefits authorized by the Agency upon being provided with appropriate documentation detailing the additional purchases of property or services.

Section 2. The Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency are hereby authorized, on behalf of the Agency, to execute and deliver any agreements, documents or certificates necessary and incidental to providing the Company with the Sales and Use Tax Exemption Benefits and necessary to effectuate the above-described extension.

Section 3. The Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency are hereby authorized and directed for and in the name and on behalf of the Agency to do all acts and things required and to execute and deliver all such certificates, instruments and documents, to pay all such fees, charges and expenses and to do all such further acts and things as may be necessary or, in the opinion of such Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency acting, desirable and proper to effect the purposes of the foregoing resolutions and to cause compliance by the Agency with all of the terms, covenants and provisions of the documents executed for and on behalf of the Agency.

Section 4. This resolution shall take effect immediately.

*[Remainder of Page Intentionally Left Blank]*

The question of the adoption of the foregoing Resolution was duly put to vote on roll call, which resulted as follows:

	<u><i>Yea</i></u>	<u><i>Nay</i></u>	<u><i>Absent</i></u>	<u><i>Abstain</i></u>
Jay Popli				
Troy Milne				
Lisa Bolzner				
Joseph Alloco				
Rhett King				
Norman Jones				
Ann L. Burr				

The Resolutions were thereupon duly adopted.

STATE OF NEW YORK )  
COUNTY OF MONROE ) ss.:

I, the undersigned Executive Director of the County of Monroe Industrial Development Agency, DO HEREBY CERTIFY:

That I have compared the annexed extract of the minutes of the meeting of the County of Monroe Industrial Development Agency (the "Agency"), including the resolutions contained therein, held on June 20, 2023, with the original thereof on file in my office, and that the same is a true and correct copy of the proceedings of the Agency and of such resolutions set forth therein and of the whole of said original insofar as the same related to the subject matters therein referred to.

I FURTHER CERTIFY that public notice of the time and place of said meeting was duly given to the public and the news media in accordance with Sections 103 and 104 of the New York Public Officers Law (Open Meetings Law) that all members of the Agency had due notice of the meeting and that the meeting was in all respects duly held.

N WITNESS WHEREOF, I have hereunto set my hand on this 20<sup>th</sup> day of June, 2023.

\_\_\_\_\_  
Ana J. Liss, Executive Director



Applicant: 125 Howell Street LLC  
Project Address: 125 Howell Street, Rochester, NY 14607  
Contact Name: Don Lasher  
Contact Company: Capstone Construction Services LLC  
Contact Address: 100 Savannah Street, Rochester, NY 14607  
Contact Email: Don@capstonered.com Contact Phone: 585.546.6459

Employment in Monroe County:                      1 Completion  
Full Time Part Time As of Date

**Modification Requested:** Check all that apply. (Attach additional page if necessary). Legal fees apply.

\*\*\*A substantial change in project costs or scope may require a new application.\*\*\*

☐ **Increase in Project Costs:** Must complete page 2. (If there is a significant change in Project Scope, an application will be required.)

**Assistance Requested:** Check all that apply.

☒ Property Tax Abatement

☒ Mortgage Tax Exemption

☒ Sales Tax Exemption

**Project Cost Information:** \$ 1,420,094 \$                      \$                       
Original Project Cost Increase in Project Costs New Project Costs

☒ **Extend or Renew Sales Tax Exemption:** (If exemption date has expired, a \$350 fee applies.)

6/30/23 6/30/25 \$ 0  
Current Expiration Date Requested Expiration Date Amount of Exemptions Taken to Date

**Reason for Extension:**

The project was delayed due to the pandemic and price escalations. We modified the design and repriced the project and hope to break ground in the next couple of months.

☐ **New Tenant:** Include name, business description, and square feet to be occupied.

Applicant hereby represents that (i) it is not in default under any documents executed in connection with the Project being modified; (ii) Applicant will pay all applicable fees of the Agency and its counsel in connection with the modification of the Project.

Signed: Don Lasher Date: 5/23/23

Print Name and Title: Don Lasher, Managing Member

Staff Use Only: 5/23/23 7/23/19 19 015 D 2/20  
Date Received                      Date of Original Approval:                      New Code 2602



## MODIFICATION SUMMARY

**DATE:** June 20, 2023

**APPLICANT:**

I-Square, LLC  
85 Excel Drive  
Rochester, NY 14621

**PROJECT LOCATION:**

Titus Avenue- South of Cooper Road  
Rochester, NY 14617

**MODIFICATION REQUEST:**

I-Square is a mixed-use town center development in the Town of Irondequoit. The project was originally approved in March 2013 for a custom real property tax abatement, mortgage recording tax and sales tax exemptions. This ongoing project received extensions of the sales tax exemption benefit through June 30, 2023. This request is for another extension through December 31, 2024 due to a longer than anticipated construction period. The project is expected to be completed in 2024.

**PROJECT AMOUNT**

ORIGINAL  
\$9,900,000



**Motion By:** \_\_\_\_\_  
**Seconded By:** \_\_\_\_\_

**RESOLUTION**  
 (I-Square, LLC Project)  
 OSC Project Code: 2602-13-014E

A regular meeting of the County of Monroe Industrial Development Agency (the "Agency"), was held at the Agency's offices located at 50 West Main Street, Rochester, New York 14614, on June 20, 2023 at 12:00 p.m.

After the meeting had been duly called to order, the Chair announced that among the purposes of the meeting was to consider and take action on certain matters pertaining to a certain Project more particularly described below.

RESOLUTION OF THE COUNTY OF MONROE INDUSTRIAL DEVELOPMENT AGENCY (THE "AGENCY") AUTHORIZING THE EXTENSION OF THE SALES AND USE TAX EXEMPTION BENEFITS (AS HEREINAFTER DEFINED) GRANTED TO I-SQUARE, LLC (THE "COMPANY") THROUGH DECEMBER 31, 2024, AND THE EXECUTION OF RELATED DOCUMENTS.

WHEREAS, by Title I of Article 18-A of the General Municipal Law of the State of New York, as amended and Chapter 55 of the Laws of 1972 of the State of New York (collectively, the "Act"), the Agency was created with the authority and power among other things, to assist with the acquisition of certain industrial development projects as authorized by the Act; and

WHEREAS, by Resolutions duly adopted on March 19, 2013 and November 16, 2021 (collectively, the "Authorizing Resolution"), the Agency appointed **I-Square, LLC**, a New York limited liability company, for itself or an entity formed or to be formed (collectively, the "Company"), the true and lawful agent of the Agency to undertake a certain project (the "Project") consisting of the acquisition by lease or otherwise, and interest in various properties located just south of the intersection of Titus Avenue and Cooper Road in the Town of Irondequoit, County of Monroe, New York (the "Land"); (B) the demolition of the existing improvements and the construction on the Land of a new road extension and a mixed-use "Town Center" comprised of approximately seven new buildings totaling at least 92,000 square feet of space, consisting of, but not limited to, an art gallery, outdoor amphitheater stage with room for 400 spectators, a community learning and business conference center, rooftop gardens, retail space, restaurants, office and residential space (collectively, the "Improvements"), and (C) the acquisition and installation therein, thereon or thereabout of various machinery, equipment and related personal property (the "Equipment" and, together with the Land and the Improvements, the "Facility"); all pursuant the Act; and

WHEREAS, the Agency previously appointed the Company as its true and lawful agent to make purchases of goods and services relating to the Project that would otherwise be subject to New York State and local sales and use tax (the "Sales and Use Tax Exemption Benefits") through December 31, 2019; and

WHEREAS, the Agency subsequently extended the Company's exempt status for Sales and Use Tax Exemption Benefits in connection with the Project through June 30, 2020; and

WHEREAS, the Company then requested the Agency grant a further extension to its sales tax exemption through December 31, 2021; and

WHEREAS, the Company, pursuant to a certain Project Modification Request, dated October 26, 2021, requested the Agency grant a further extension to the Sales and Use Tax Exemption Benefits through June 30, 2023; and

WHEREAS, the Company now desires a further extension to its Sales and Use Tax Exemption Benefits and has, pursuant to a certain Project Modification Request, dated May 17, 2023, requested the Agency grant a further extension to the Sales and Use Tax Exemption Benefits through December 31, 2024; and

WHEREAS, the Agency desires to adopt a resolution authorizing the extension of Sales and Use Tax Exemption Benefits to the Company and the execution and delivery of any documents necessary and incidental thereto.

NOW, THEREFORE, BE IT RESOLVED by the County of Monroe Industrial Development Agency as follows:

Section 1. Based upon the representation and warranties made by the Company in its request, the Agency hereby authorizes and approves the Company, as its agent, to continue to make purchases of goods and services relating to the Project and that would otherwise be subject to New York State and local sales and use tax through **December 31, 2024**. The Agency agrees to consider any requests by the Company for another extension or an increase to the amount of Sales and Use Tax Exemption Benefits authorized by the Agency upon being provided with appropriate documentation detailing the additional purchases of property or services.

Section 2. The Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency are hereby authorized, on behalf of the Agency, to execute and deliver any agreements, documents or certificates necessary and incidental to providing the Company with the Sales and Use Tax Exemption Benefits and necessary to effectuate the above-described changes with respect to the Facility.

Section 3. The Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency are hereby authorized and directed for and in the name and on behalf of the Agency to do all acts and things required and to execute and deliver all such certificates, instruments and documents, to pay all such fees, charges and expenses and to do all such further acts and things as may be necessary or, in the opinion of such Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency acting, desirable and proper to effect the purposes of the foregoing resolutions and to cause compliance by the Agency with all of the terms, covenants and provisions of the documents executed for and on behalf of the Agency.

Section 4. This resolution shall take effect immediately.

The question of the adoption of the foregoing Resolution was duly put to vote on roll call, which resulted as follows:

	<u><i>Yea</i></u>	<u><i>Nay</i></u>	<u><i>Absent</i></u>	<u><i>Abstain</i></u>
Jay Popli				
Troy Milne				
Lisa Bolzner				
Joseph Alloco				
Rhett King				
Norman Jones				
Ann L. Burr				

The Resolutions were thereupon duly adopted.

*[Remainder of Page Intentionally Left Blank]*

STATE OF NEW YORK )  
COUNTY OF MONROE ) ss.:

I, the undersigned Executive Director of the County of Monroe Industrial Development Agency, DO HEREBY CERTIFY:

That I have compared the annexed extract of the minutes of the meeting of the County of Monroe Industrial Development Agency (the "Agency"), including the resolutions contained therein, held on June 20, 2023, with the original thereof on file in my office, and that the same is a true and correct copy of the proceedings of the Agency and of such resolutions set forth therein and of the whole of said original insofar as the same related to the subject matters therein referred to.

I FURTHER CERTIFY that public notice of the time and place of said meeting was duly given to the public and the news media in accordance with Sections 103 and 104 of the New York Public Officers Law (Open Meetings Law) that all members of the Agency had due notice of the meeting and that the meeting was in all respects duly held.

IN WITNESS WHEREOF, I have hereunto set my hand on this 20<sup>th</sup> day of June, 2023

\_\_\_\_\_  
Ana J. Liss, Executive Director



# PROJECT MODIFICATION REQUEST

If you have any questions or need assistance, please call 585.753.2000.

Applicant: I-Square, LLC  
 Project Address: Various Properties South of the Intersection of Titus Ave + Cooper Rd.  
 Contact Name: Michael Nolan  
 Contact Company: I-Square, LLC  
 Contact Address: 85 Excel Drive Rochester, NY 14621  
 Contact Email: mnolan@i-square.us Contact Phone: (585) 943-1941

Employment in Monroe County: 7 59 12/31/22  
 Full Time Part Time As of Date

**Modification Requested:** Check all that apply. (Attach additional page if necessary)

☐ **Increase in Project Costs:** Must complete page 2. (If Increase is 25% greater than the Original Project Costs or there is a significant change in Project Scope, an application will be required.)

**Assistance Requested:** Check all that apply.

☐ Property Tax Abatement

☐ Mortgage Tax Exemption

☐ Sales Tax Exemption

**Project Cost Information:** \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ 0  
 Original Project Cost Increase in Project Costs New Project Costs

☒ **Extend or Renew Sales Tax Exemption:** (If exemption date has expired, a \$350 fee applies.)

6/30/23  
 Current Expiration Date

12/31/24  
 Requested Expiration Date

\$ 533,432 (reported thru 12/31/22)  
 Amount of Exemptions Taken to Date

**Reason for Extension:**

Extend through 2024 Construction Season. Project Completion expected yr. end 2024.

☐ **New Tenant:** Include name, business description, and square feet to be occupied.

Applicant hereby represents that (i) it is not in default under any documents executed in connection with the Project being modified; (ii) Applicant will pay all applicable fees of the Agency and its counsel in connection with the modification of the Project.

Signed: [Signature] Date: 5-17-23

Print Name and Title: Michael Nolan, Sole member

Staff Use Only: 5/17/29 3/19/13 13 014 E <sup>2/20</sup>  
 Date Received Date of Original Approval: New Code 2602

## Finnerty, Robin

---

**From:** Diane Zaccarine <dzaccarine@i-square.us>  
**Sent:** Thursday, May 18, 2023 9:13 AM  
**To:** Finnerty, Robin; Lori Palmer  
**Cc:** Mike Nolan; Diane Zaccarine  
**Subject:** Re: Sales Tax Exemption for I-Square, LLC -RE: Extension Request

CAUTION: This email originated from outside Monroe County systems. Exercise caution when opening attachments or clicking links, especially from unknown senders.

~~~~~

No problem Robin, here's our status:

Although we completed the Brewery, Senior Housing and various Site + Landscape Improvements these past 3 years, we experienced significant delays throughout the pandemic, as well as subsequent labor and materials shortages. We expect to resume construction activities for the next commercial building on Titus Avenue early next year, and will apply the remaining sales tax exemption dollars towards its completion.

Diane

---

**From:** Finnerty, Robin <RFinnerty@monroecounty.gov>  
**Sent:** Wednesday, May 17, 2023 3:35 PM  
**To:** Diane Zaccarine <dzaccarine@i-square.us>; Lori Palmer <lpalmer@harrisbeach.com>  
**Cc:** Mike Nolan <mnolan@i-square.us>; Diane Zaccarine <dzacis@rochester.rr.com>  
**Subject:** RE: Sales Tax Exemption for I-Square, LLC -RE: Extension Request

This message was sent securely using Zix®

Thanks Diane –

Can you also provide detail on the current status of the project and additional information on the need for the extension? The board will want more of an explanation since the project was originally approved in 2013. The next board meeting is June 20<sup>th</sup>.

Robin

Robin Finnerty, Deputy Director  
 County of Monroe Industrial Development Agency  
 50 West Main Street, Suite 1150  
 Rochester, NY 14614  
 585-753-2037



**MODIFICATION SUMMARY**

**DATE:** June 20, 2023

**APPLICANT:**

JD & Sons, Inc.  
11 Parsells Avenue  
Rochester, New York 14609

**PROJECT LOCATION:**

100 International Boulevard  
Rochester, New York 14624

**MODIFICATION REQUEST:**

JD & Sons, Inc., a wholesale seafood processing company, is constructing a new 28,000 sq ft building in the Town of Chili. The project was originally approved in April 2022. The applicant is now seeking an extension of the sales tax exemption through December 31, 2023 as more time is needed to complete the project.

**PROJECT AMOUNT**

ORIGINAL  
\$5,760,000

**Motion By:** \_\_\_\_\_  
**Seconded By:** \_\_\_\_\_

**RESOLUTION**  
 (JD & Sons, Inc. Project)  
 OSC Project Code 2602-22-013B

A regular meeting of the County of Monroe Industrial Development Agency (the "Agency"), was held at the Agency's offices located at 50 West Main Street, Rochester, New York 14614, on June 20, 2023 at 12:00 p.m.

After the meeting had been duly called to order, the Chair announced that among the purposes of the meeting was to consider and take action on certain matters pertaining to a certain Project more particularly described below.

RESOLUTION OF THE COUNTY OF MONROE INDUSTRIAL DEVELOPMENT AGENCY (THE "AGENCY") AUTHORIZING THE EXTENSION OF THE SALES AND USE TAX EXEMPTION BENEFITS (AS HEREINAFTER DEFINED) GRANTED TO JD & SONS, INC. (THE "COMPANY") THROUGH DECEMBER 31, 2023, AND THE EXECUTION OF RELATED DOCUMENTS.

WHEREAS, by Title I of Article 18-A of the General Municipal Law of the State of New York, as amended and Chapter 55 of the Laws of 1972 of the State of New York (collectively, the "Act"), the Agency was created with the authority and power among other things, to assist with the acquisition of certain industrial development projects as authorized by the Act; and

WHEREAS, by Resolution duly adopted on April 19, 2022, the Agency appointed **JD & Sons, Inc.**, a New York corporation, for itself or an entity formed or to be formed (collectively, the "Company"), the true and lawful agent of the Agency to undertake a certain project (the "Project") consisting of: (A) the acquisition of a leasehold interest in a portion of an approximately 9.68-acre parcel of land located at 100 International Boulevard in the Town of Chili, New York 14624 (the "Land"); (B) the construction on the Land of an approximately 28,000 square-foot building (the "Improvements"); and (C) the acquisition and installation therein, thereon or thereabout of certain machinery, equipment and related personal property (collectively, the "Equipment" and, together with the Land and the Improvements, the "Facility"); to be used by the Company in its business as a wholesale seafood processing company; all pursuant the Act; and

WHEREAS, the Company has, pursuant to a certain Project Modification Request, dated June 13, 2023, requested the Agency extend its authorization of the Company to make purchases of goods and services relating to the Project that would otherwise be subject to New York State and local sales and use tax (the "Sales and Use Tax Exemption Benefits") through December 31, 2023; and

WHEREAS, the Agency desires to adopt a resolution authorizing the extension of Sales and Use Tax Exemption Benefits to the Company and the execution and delivery of any documents necessary and incidental thereto.



NOW, THEREFORE, BE IT RESOLVED by the County of Monroe Industrial Development Agency as follows:

Section 1. Based upon the representation and warranties made by the Company in its request, the Agency hereby authorizes and approves the Company, as its agent, to continue to make purchases of goods and services relating to the Project and that would otherwise be subject to New York State and local sales and use tax through **December 31, 2023**. The Agency agrees to consider any requests by the Company for another extension or an increase to the amount of Sales and Use Tax Exemption Benefits authorized by the Agency upon being provided with appropriate documentation detailing the additional purchases of property or services.

Section 2. The Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency are hereby authorized, on behalf of the Agency, to execute and deliver any agreements, documents or certificates necessary and incidental to providing the Company with the Sales and Use Tax Exemption Benefits and necessary to effectuate the above-described extension.

Section 3. The Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency are hereby authorized and directed for and in the name and on behalf of the Agency to do all acts and things required and to execute and deliver all such certificates, instruments and documents, to pay all such fees, charges and expenses and to do all such further acts and things as may be necessary or, in the opinion of such Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency acting, desirable and proper to effect the purposes of the foregoing resolutions and to cause compliance by the Agency with all of the terms, covenants and provisions of the documents executed for and on behalf of the Agency.

Section 4. This resolution shall take effect immediately.

*[Remainder of Page Intentionally Left Blank]*

The question of the adoption of the foregoing Resolution was duly put to vote on roll call, which resulted as follows:

|               | <u><i>Yea</i></u> | <u><i>Nay</i></u> | <u><i>Absent</i></u> | <u><i>Abstain</i></u> |
|---------------|-------------------|-------------------|----------------------|-----------------------|
|               |                   |                   |                      |                       |
| Jay Popli     |                   |                   |                      |                       |
| Troy Milne    |                   |                   |                      |                       |
| Lisa Bolzner  |                   |                   |                      |                       |
| Joseph Alloco |                   |                   |                      |                       |
| Rhett King    |                   |                   |                      |                       |
| Norman Jones  |                   |                   |                      |                       |
| Ann L. Burr   |                   |                   |                      |                       |

The Resolutions were thereupon duly adopted.

STATE OF NEW YORK )  
COUNTY OF MONROE ) ss.:

I, the undersigned Executive Director of the County of Monroe Industrial Development Agency, DO HEREBY CERTIFY:

That I have compared the annexed extract of the minutes of the meeting of the County of Monroe Industrial Development Agency (the "Agency"), including the resolutions contained therein, held on June 20, 2023, with the original thereof on file in my office, and that the same is a true and correct copy of the proceedings of the Agency and of such resolutions set forth therein and of the whole of said original insofar as the same related to the subject matters therein referred to.

I FURTHER CERTIFY that public notice of the time and place of said meeting was duly given to the public and the news media in accordance with Sections 103 and 104 of the New York Public Officers Law (Open Meetings Law) that all members of the Agency had due notice of the meeting and that the meeting was in all respects duly held.

IN WITNESS WHEREOF, I have hereunto set my hand on this 20<sup>th</sup> day of June, 2023.

\_\_\_\_\_  
Ana J. Liss, Executive Director



## PROJECT MODIFICATION REQUEST

If you have any questions or need assistance, please call 585.753.2000.

65

Applicant: JD & SONS, INC.  
 Project Address: 100 International Blvd.  
 Contact Name: Kyle Simaz, VP  
 Contact Company: JD & SONS, INC.  
 Contact Address: 100 Parsells Ave. Natch.  
 Contact Email: jdseefood@yahoo.com Contact Phone: 288-4450

Employment in Monroe County: 60 0 6/13/23  
 Full Time Part Time As of Date

**Modification Requested:** Check all that apply. (Attach additional page if necessary). Legal fees apply.

\*\*\*A substantial change in project costs or scope may require a new application.\*\*\*

☐ **Increase in Project Costs:** Must complete page 2. (If there is a significant change in Project Scope, an application will be required.)

**Assistance Requested:** Check all that apply.

☐ Property Tax Abatement

☐ Mortgage Tax Exemption

☐ Sales Tax Exemption

**Project Cost Information:** \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ 0  
 Original Project Cost Increase in Project Costs New Project Costs

☒ **Extend or Renew Sales Tax Exemption:** (If exemption date has expired, a \$350 fee applies.)

6/30/23 9/30/23 \$ 232,244  
 Current Expiration Date Requested Expiration Date Amount of Exemptions Taken to Date

**Reason for Extension:** wrapping up project,  
Equipment start-ups.

☐ **New Tenant:** Include name, business description, and square feet to be occupied.

Applicant hereby represents that (i) it is not in default under any documents executed in connection with the Project being modified; (ii) Applicant will pay all applicable fees of the Agency and its counsel in connection with the modification of the Project.

Signed: FLIAS DIAKOMITHALIS Date: 6/13/23

Print Name and Title: FLIAS DIAKOMITHALIS, PRESIDENT

Staff Use Only:

2/20

Date Received 6/13/23 Date of Original Approval: 4/19/22 New Code 2602 22 013 B

## LABOR POLICY COUNTY OF MONROE INDUSTRIAL DEVELOPMENT AGENCY

The County of Monroe Industrial Development Agency (IDA) was established for the purpose of creating employment opportunities for, and to promote the general prosperity and economic welfare of the residents of Monroe County. The IDA offers economic incentives and benefits to qualified applicants who wish to locate or expand their businesses or facilities in Monroe County. When the IDA approves a project, it enters into agreements to extend these incentives and benefits to the applicant.

Construction jobs are vital to the overall employment opportunities and economic growth in Monroe County. The IDA believes that companies benefiting from its incentive programs should employ local laborers, mechanics, craft persons, journey workers, equipment operators, truck drivers and apprentices ("construction workers"), during the construction phase of projects.

*Violation of the Local Labor Policy is subject to IDA Board review, which may result in the suspension, revocation, termination and/or recapture of any or all benefits conferred by the IDA.*

### **100% Local Labor**

Applicants receiving IDA benefits ***must*** ensure that it and/or its contractor/developer hire ***100% of its construction workers from the local labor market.***

### **Local Labor Market**

For the purpose of this policy, the local labor market is defined as construction workers residing in the following counties in New York State: Monroe, Genesee, Livingston, Orleans, Ontario, Seneca, Steuben, Wayne, Wyoming and Yates.

### **Bid Processing**

Local participation in qualified projects receiving IDA economic incentives and benefits is vital to the economic growth of Monroe County. As such, all applicants/contractors/developers of a qualified project with a minimum \$5,000,000 investment must place any and all invitations to bid in the Builders Exchange of Rochester Plan Room (<https://robex.com/planroom/>) two weeks before the bids are due.

### **Monitoring**

A third-party auditing firm ("Project Monitor") will be engaged to monitor construction work commencing on the date benefits are granted by resolution of the IDA Board. Once approved for IDA benefits, all applicants will be required to provide to the Project Monitor and the Exemption Processor (as hereinafter defined) the following information:

1. Contact information for the applicant's representative who will be responsible and accountable for providing information about the bidding and awarding of construction contracts relative to the applicant's project; and
2. Description of the nature of construction jobs created by the project, including in as much detail as possible, the number, type and duration of construction positions.

All Monroe County IDA projects are subject to local monitoring by the IDA and the Project Monitor. Proof of residency or copy of drivers' license shall be checked by the Project Monitor during the Project Monitor's periodic inspection of the project.

The Project Monitor shall issue a report to the IDA staff immediately when an applicant or applicant's contractor is not in compliance with this labor policy. IDA staff shall advise the IDA Board of non-compliance by email or at the next scheduled meeting. If a violation of policy has occurred, the Project Monitor shall notify the applicant and contractor of such non-compliance and give applicant a warning of violation and 72 hours in which to correct such violation. ***Upon evidence of continued non-compliance or additional violations, the IDA and/or the Project Monitor shall notify the applicant that the project is in violation of the Local Labor Policy and is subject to IDA Board action, which may result in the suspension, revocation, termination and/or recapture of any or all benefits conferred by the IDA.***

### **Signage**

The applicant/contractor/developer of an IDA approved project shall be required to maintain a sign, provided by the Project Monitor, on the project site at all times during construction. This sign shall be located in an area that is accessible to onsite workers and visitors, which should be clear and legible.

### **Exemption Process**

In some instances, use of 100% local labor may not be possible for any of the following reasons:

1. Warranty issues related to installation of certain products.
  - Required Documentation: A copy of the warranty confirming that the product must be installed by the manufacturer. Where the manufacturer requires installation by an approved third-party installer, the IDA requires information regarding skills, certifications and/or training possessed by the third-party installer.<sup>1</sup> The IDA and its third-party processor (the "Exemption Processor") reserve the right to request additional documentation.
2. Specialized construction and no local contractors or local construction workers have the required skills, certifications or training to perform the work.

<sup>1</sup> The granting of an exemption for the use of non-local labor on warranty related grounds for the use of a third-party installer is expressly conditioned on the hiring of a pre-apprentice(s), an apprentice(s) or local construction laborer(s) to assist in the installation. The installation by the manufacturer does not have this requirement.

- Required Documentation: Information regarding the skills, certifications and/or training the construction workers must possess and proof of communication with local contractors. The IDA and the Exemption Processor reserve the right to request additional documentation.
3. Significant cost differentials in bids whereby use of local labor significantly increases the cost of the project. ~~Three~~At least three (3) bids are required and a cost differential of 25% is deemed significant. Where there is a significant cost differential and the local labor contractor agrees to reduce the bid to the average of the two bids, no waiver will be granted. However, if the average is still 25% or more, a waiver will be granted.
    - Required Documentation: Copies of all bids/proposals received, including pricing, to confirm cost differential, including a demonstration of good faith efforts to procure at least three (3) bids. All bids must demonstrate an equal scope of work. The IDA and the Exemption Processor reserve the right to request additional documentation.
  4. No local labor available for the project.
    - Required Documentation: Proof of solicitation of local bids, an explanation how the bid was advertised/solicited and proof of communication with local contractors. Additionally, if applicable, written confirmation that local labor is not available (i.e., correspondence from union halls or local contractors). The IDA and the Exemption Processor reserve the right to request additional documentation.

**The IDA and the Exemption Processor require at least forty-five (45) calendar days to process a request for a exemption from local labor. The forty-five (45) calendar days shall commence upon submission of the request for exemption, together with complete and accurate required documentation.** The request will be reviewed by the Exemption Processor and forwarded to the IDA, at which time the IDA's Executive Director shall have the authority to approve or disapprove the exemption. The Exemption Processor shall report each authorized exemption to the Board of Directors at its monthly meeting.

Document comparison by Workshare Compare on Tuesday, June 13, 2023  
2:21:08 PM

| Input:        |                                  |
|---------------|----------------------------------|
| Document 1 ID | netdocuments://4876-2342-9965/3  |
| Description   | Local Labor Policy (COMIDA 2023) |
| Document 2 ID | netdocuments://4876-2342-9965/4  |
| Description   | Local Labor Policy (COMIDA 2023) |
| Rendering set | Standard                         |

| Legend:                   |  |
|---------------------------|--|
| <u>Insertion</u>          |  |
| <del>Deletion</del>       |  |
| <u>Moved from</u>         |  |
| <u>Moved to</u>           |  |
| Style change              |  |
| Format change             |  |
| <del>Moved deletion</del> |  |
| Inserted cell             |  |
| Deleted cell              |  |
| Moved cell                |  |
| Split/Merged cell         |  |
| Padding cell              |  |

| Statistics:    |       |
|----------------|-------|
|                | Count |
| Insertions     | 6     |
| Deletions      | 2     |
| Moved from     | 0     |
| Moved to       | 0     |
| Style changes  | 0     |
| Format changes | 0     |
| Total changes  | 8     |



## WORKFORCE DEVELOPMENT FUND APPLICATION

COMIDA is proud to support workforce development initiatives to improve access to employment opportunities. Please fill in all information below and attach your program proposal to be considered for support. For questions and submissions, please email Allison Clark at [AllisonClark@monroecounty.gov](mailto:AllisonClark@monroecounty.gov) or call (585) 753-2006.

Organization and/or Program Name: (YAMTEP, Inc.), Young Adult Manufacturing Training Employment Program

---



---

Contact Name: Tyrone Reaves \_\_\_\_\_ Contact Phone: 585-739-4383 \_\_\_\_\_

Contact Email: [tyrone.reaves@yamtep.com](mailto:tyrone.reaves@yamtep.com) \_\_\_\_\_ Year program started: 2015 \_\_\_\_\_

Address: 282 Hollenbeck Street \_\_\_\_\_ City: Rochester \_\_\_\_\_ State: NY Zip: 14621

Tax EIN: 47-5000982 \_\_\_\_\_

**Please attach to this page your proposal for program funding. Please note, you must address each of the questions below to be considered for funding**

- A brief overview of your program including your program's mission and target audience.
- Who are your other community partners, if any. Please list all funding partners, collaborative partners as well as businesses or industry groups for job placement.
- How your program is directly linked to job creation in Monroe County. Are jobs available for the program participants to be placed into upon completion of the program/training.
- How you plan to measure the success of your program. Performance metrics should include success rates, job placement rates and number of participants. If your program is new, projected metrics should be included.
- Amount of funding requested and how these dollars would be used.
- A copy of the operating budget and statement of financial position (balance sheet).
- Administration and operation of the organization. Please give a basic outline of how the program organizational structure as well as staff duties, org chart and an explanation of internal controls.
- Copy of your most recent audit.

**1. A brief overview of your program including your program's mission and target audience.**

YAMTEP is an anti-poverty, workforce development and employment initiative leveraging the manufacturing industry "know-how" to provide training with a goal of matching trainees with employers, filling gaps, providing jobs and career pathways. YAMTEP is aimed at providing the chronically unemployed and unskilled with the training needed to secure and maintain employment. The program accepts participants ranging in age from 19 to 60 years old, does not require a high school diploma or equivalent and serves participant demographics who are underemployed or unemployed. YAMTEP's goal is to provide a training program that enables transitioning a person in poverty to being financially independent with laser focus on participants being employment ready.

We provide three main core competencies through our adult program, high school program and transportation program. Our adult program is a 3-week curriculum specializing in job readiness, essential skills, CNC training, forklift certification and manufacturing fundamentals. Our high school program has two sessions annually, which includes a 12-week Spring curriculum and a 9-week summer curriculum for seniors seeking guidance in post-graduate opportunities such as workforce entry, higher education or military pathways. Our transportation program is provided for students of both adult and high school participants and is offered at a reduced fee or free of cost, if applicable. Transportation is a bottleneck for equal access to opportunities, especially when public transportation routes are not all encompassing. We coordinate YAMTEP drivers to pick up and drop off students either at the training facility and or job location with 15-passenger seated vans. By giving our students these tools and resources, they are set up for success.

**2. Who are your other community partners, if any. Please list all funding partners, collaborative partners as well as businesses or industry groups for job placement.**

YAMTEP has developed a collective impact training that is based upon community partners, funding partners, and employment partners collaborating with the instructors to provide people living in poverty with the necessary skills to meet the needs of the region's next generation of employers. Our community members range from participant enrollment partners, participant barriers and support partners, training support partners and employer partners. Our participant enrollment partners include City of Rochester, DHS, D.O.C., Rochester Works, PathStone, Veterans Association, and Rochester City School District. YAMTEP's participant barriers and support partners include City of Rochester, DHS, Rochester Rehab, and PathStone. Training support partners include Wegmans, Randstad, McAlphin, WebSeal, Cantel, Foodlink and Vision Federal Credit Union. YAMTEP now has over sixty employer partners including Randstad, U of R, Gorbels, Optimax, Alliance Plastics, RPO, Product Int., TruForm, JOT, Advantage, Lidestri and Plug Power. YAMTEP staff works with employer partners to assure a good student/employee match with employer partners that have permanent long-term positions. Our funding partners include the City of Rochester, Monroe County, ESL, Ralph Wilson Jr. Foundation and RochesterWorks. YAMTEP will continue to apply for federal, state, local and charitable foundations that support workforce development initiatives.

**3. How your program is directly linked to job creation in Monroe County. Are jobs available for the program participants to be placed into upon completion of the program/training.**

There is a workforce development need to help close the gap on entry level jobs in the manufacturing industry in Monroe County. Jobs obtained by our training program participants meet the criteria for "good jobs". Our participants are matched with job placements within companies that enable them to become financially self-sufficient with a livable wage, provides experience for future growth opportunities for salary negotiations and affords them with economic security through acquired transferable skill sets. YAMTEP has had great success, showing sustained results with employers over the 8-year period. We've achieved approximately 75% job placement rate for students that completed training. Since October of 2022, we've had 154 students enrolled, 44 dropped and 60 hired. This includes 18 students currently in the process of being hired. The curriculum is designed to develop student's hard skills, soft skills, and

essential workplace readiness skills to bridge employment gaps. The program can be modified to better support career pathing between cohorts. Instructors highlight employees' growth areas as they progress through the curriculum, while keeping feedback constructive and providing resources or pathways to help students move forward. These might include coaching sessions, mentorship, and internal professional development one on ones. Career pathway discussions between instructors and students include the difference in trajectories both across industries and between individuals. For some students, a career path can be a linear upward trajectory. For others, it may involve lateral moves to gain skills to pivot and explore a different pathway. Students who leave the program gain skills in CNC operation, forklift operation, blueprint reading, and warehouse operations that they can leverage in the job market. Jobs are available for the program participants to be placed into upon completion of the program.

- 4. How you plan to measure the success of your program. Performance metrics should include success rates, job placement rates and number of participants. If your program is new, projected metrics should be included.**

YAMTEP will measure progress made towards these goals by hiring a data analyst to assist with tracking participant and employer success. The data analyst will create a program dashboard or scorecard to capture operational measures as well as identified quality outcomes measures. The program will be evaluated through specific metrics such as total enrollment rate, total participant training completion rate, and total job placement rate vs. continuing education and or military pathway rates. YAMTEP is committed to evaluating the program with the baseline goal of 50% job, college, or military placement for total enrolled participants. YAMTEP will utilize the collective impact model and structure of the Rochester-Monroe Anti-Poverty Initiative (RMAPI) to further evaluate the economic impact of the program within the region.

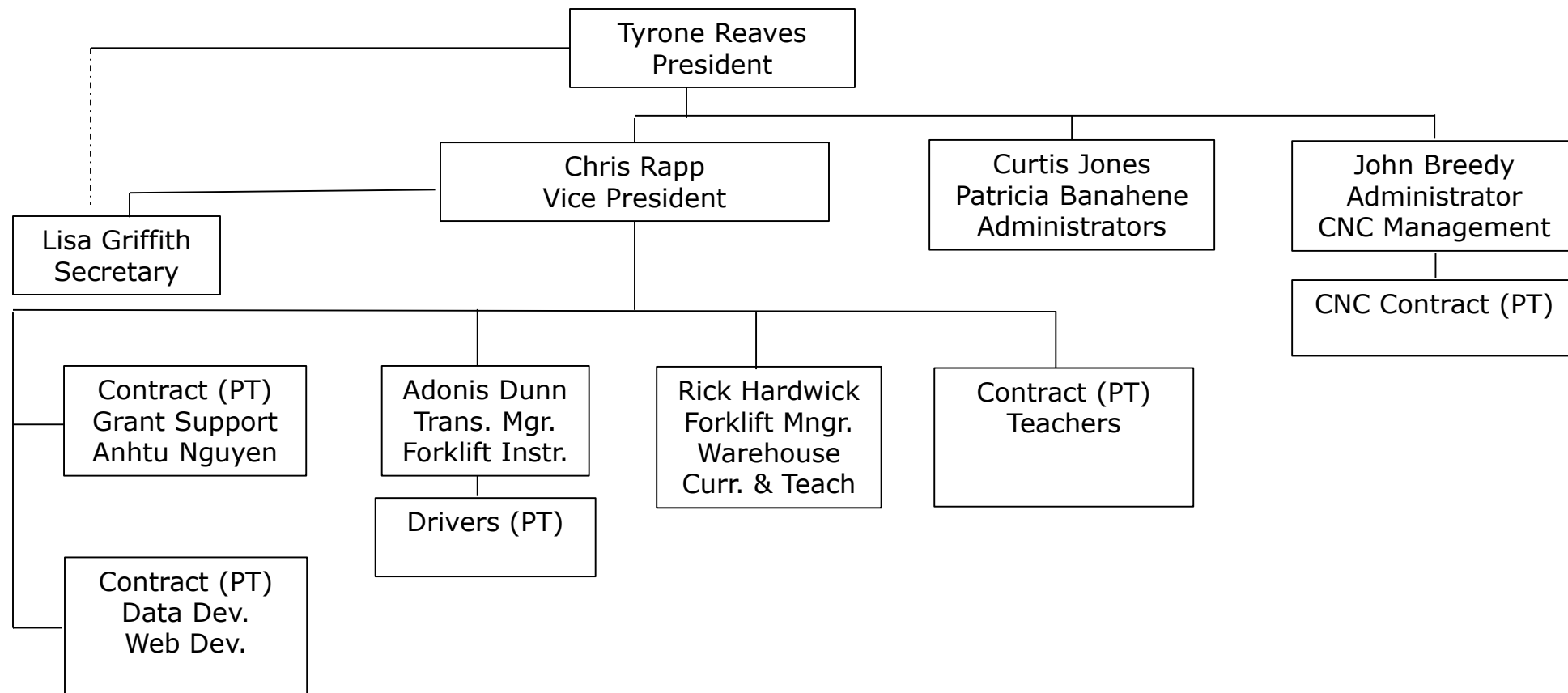
- 5. Amount of funding requested and how these dollars would be used.**

YAMTEP is requesting \$520,000 for the fiscal year 2024. The monies would be used for growth initiatives and enable a student growth plan of 25-50 people per each year of grant support and would provide critical administrative personnel, instructors, training materials, transportation expenses, training space expenses, marketing/outreach expenses, and high school student stipends. 2 additional 15-passenger vans would be procured to accommodate the growth of the program.

- 6. A copy of the operating budget and statement of financial position (balance sheet).**
7. Administration and operation of the organization. Please give a basic outline of how the program organizational structure as well as staff duties, org chart and an explanation of internal controls.
- 8. Copy of your most recent audit.**

# YAMTEP: Organization Chart

Community manufacturing training program.





## COMIDA Summary Report

June 7, 2023

# YAMTEP: Adult Summary

Community manufacturing training program.



## YAMTEP Totals – October 2022 – May 2023

| Total Enrolled | Total Graduates | Total Dropped | Employed | In Process | Cont. Education | Cannot contact |
|----------------|-----------------|---------------|----------|------------|-----------------|----------------|
| 155            | 93              | 55            | 52       | 33         | 8               | 9              |

**Percent Employed = 71%**

•  $\text{Employed} + \text{Cont. Ed.} / \text{Graduated} - \text{Cannot Contact} = 71\%$

*Note – recently completed cohort several people are interviewing.*

## Accomplishments

- Developed employment partnership with Plug Power and Optimax with our Basic manufacturing and employee readiness training class.
  - Employer partners offer career development (apprenticeships, continuing education).
  - Goal is to have minimum wage starting at \$18 per hour, and full benefits
- **Additional Hires with: Optimax - 10, Plug Power -31**
- **Total hires = 41**

### Transportation Support

- 8 employers
- Range of 40 – 65 riders
- Developing an off-shift transportation plan

### Employer Partnership training development

- Grant partnership with Rochester Works, in process of defining training sessions
- Nortera
  - Developing training program specifically for Nortera

# YAMTEP: High School Summary

Community manufacturing training program.



## YAMTEP 2023 High School Program Status

| HS Total Enrolled | HS Total Graduates | HS Total Dropped | HS Employed | HS Cont. Education | HSSchools participating |
|-------------------|--------------------|------------------|-------------|--------------------|-------------------------|
| 22                | tbd                | 7                | tbd         | tbd                | 2                       |

### Percent Employed - TBD

(percent employed calculation = Employed / Graduated)

- Increased High School partnership from 2 schools to **7 schools**
  - Spring session enrollment 22 students, added new curriculums to support.
    - Cable manufacturing
    - Laser operations and set up.
  - Adding summer session – goal is for 30 students
- Partnering with several educational and community teams to address next step for HS students not going to college (RIT, MCC, Round table hosted by Rochester Works)
- Engaged with RTMA FLYAP shadow program – worked with 3 students
- Partnering with employer partners to offer YAMTEP training at their manufacturing facilities, (i.e., Cannon Industries and Panther Graphics)
  - Goal is to identify 10 employer partners to support training by end of year 2023, (interested companies include Plug Power and Optimax)
- Estimated potential training enrollment of 50 – 100 students per year

### Adult & HS Totals

| Total Enrolled | Total Graduates | Total Dropped | Employed | Cont. Education | In Process |
|----------------|-----------------|---------------|----------|-----------------|------------|
| 177            | tbd             | 62            | Tbd      | tbd             | tbd        |

# YAMTEP: Staff Duties

Community manufacturing training program.



## President:

- Provide strategic direction
- Assure Not for profit alignment to all 5013C requirements are met.
- Provide financial management
- Manage all critical partners
- Create new opportunities through new partner and current partner management
- Participate on YAMTEP board

## Vice President:

- Strategic Growth Initiatives, employment and community partnership through new training opportunities, addressing student barriers (i.e. transportation)
- Provide direction and mentorship to YAMTEP staff
- Grant support

## Administrator(s):

- General administrative duties including drafting communications, managing mailings, preparing reports, and scheduling of operational activities
- Assuring employment placement for students wanting to work
- SOP management and creations meeting 5013C requirements
- Providing support to the board of directors, including meeting scheduling and distribution of board materials
- Special projects and other tasks as assigned.

## CNC Management Administrator:

- Curriculum development and training
- Train the trainers on curriculum requirements
- Define training materials
- Support student recruitment
- Support employer partnership development and management



## YAMTEP: Staff Duties (cont.)

Community manufacturing training program.



### Secretary:

- Student recruitment, and intake registration process, classroom readiness, student attendance management.
- Support resume development and completion
- Support employment process (online application, orientation, etc..)
- Support bill payment, annual audit and general filing requirement

### Grant Support:

- Seek eligible opportunities for federal, state and local funding for growth initiatives and operations
- Apply for, monitor and update all funding requests for current and future fiscal year(s)
- Close communication loop with internal stakeholders with potential funding sources and commitments

### Transportation Manager:

- Create schedule for transporting students to and from work (supporting all work shifts), and interviews
  - Create and implement schedule for drivers to meet transportation requirements of students
  - Define pick up points for students to employers
  - Manage maintenance on all vans (4vans, 1 SUV)
  - Manage all communications with students and liaison to YAMTEP management
  - Back-up driver

### Warehouse/Forklift Manager:

- Curriculum development and training
- Train the trainers on curriculum requirements
- Define training materials
- Support student recruitment
- Support employer partnership development and management

| COMIDA projected expense - 2024                       |                         |                                                                                                                        |
|-------------------------------------------------------|-------------------------|------------------------------------------------------------------------------------------------------------------------|
| Expense items                                         | 2024 Projected Expenses | Notes                                                                                                                  |
| <b>Rent &amp; Utilities (basic &amp; warehouse)</b>   | \$300,000               | Training for Warehouse, Basic mfg., Forklift, adult and HS CNC and job readiness.                                      |
| <b>Contract Services</b> (Teaching staff)             |                         |                                                                                                                        |
| CNC                                                   | \$35,000                | Trainers supporting Adult CNC                                                                                          |
| High School - CNC (spring)                            | \$33,120                | Trainers to support HS Spring (assumes 100 students)                                                                   |
| High School - CNC (Summer)                            | \$48,600                | Trainers supporting HS Summer Assumes 30 students                                                                      |
| High School - year 2 curriculum for large classes     | \$0                     | Create and implement curriculum to support HS session 2 enabling 25 people per session.                                |
| Increase # of schools participating in the HS program | \$10,000                | Year 1 - 2 schools , Year 2 - 7 schools, and will continue to invest time to grow the HS program in year 2             |
| WH                                                    | \$15,000                | RW warehouse session                                                                                                   |
| 3 Week Accelerated Cohort                             | \$50,000                |                                                                                                                        |
| Accounting Services                                   | \$7,000                 |                                                                                                                        |
| <b>Capital/Equipment Cost</b>                         |                         |                                                                                                                        |
| <b>Transportation</b>                                 |                         |                                                                                                                        |
| Van(s) Rental & Insurance                             | \$90,000                | 4 rented vans + insurance                                                                                              |
| Van(s) purchase & insurance                           | \$140,000               | 2 vans (15 seat) + insurance.                                                                                          |
| <b>Building Improvements</b>                          |                         |                                                                                                                        |
| Classroom expansion                                   | \$0                     | na                                                                                                                     |
| <b>Equipment</b>                                      |                         |                                                                                                                        |
| Forklifts                                             | \$40,000                | 1 forklift                                                                                                             |
| Reach Truck                                           |                         | na                                                                                                                     |
| CNC Machining Centers                                 | \$250,000               | Purchase CNC machining center, required tools, fixtures.                                                               |
| LVD 6K watt Laser                                     | \$200,000               | Purchased 6K watt Laser to increase training offering of                                                               |
| <b>Equipment maintenance</b>                          | \$50,000                |                                                                                                                        |
| <b>Administration</b>                                 |                         |                                                                                                                        |
| Executive Staff                                       | \$170,000               |                                                                                                                        |
| Admin(s)                                              | \$80,000                |                                                                                                                        |
| Transportation Manager (dispatch)                     | \$32,000                | NA for HS students                                                                                                     |
| Data Analysis staff                                   | \$30,000                | NA                                                                                                                     |
| Partner relationship staff                            |                         | NA                                                                                                                     |
| Maintenance Mechanic                                  | \$25,000                | Covered in Line 29 Equipment maintenance                                                                               |
| Drivers - Adult students                              | \$190,000               |                                                                                                                        |
| Student Employment Drivers                            | \$20,000                | Labor to support drivers supporting 100 HS students (4 days per                                                        |
| High School student payroll (Spring Session)          | \$43,000                | 2023 spring, assumes 50 students, 15/hr, 12hr/wk, 12 weeks.                                                            |
| High School student payroll (Summer Session)          | \$54,000                | 2023 summer, assumes 30 students, at 3 sessions, 3 wks/ session, 40/ wk/ student. 9 total weeks of training assuming 5 |
| Marketing materials                                   | \$15,000                | Website and other marketing materials does not include our HS                                                          |
| <b>Operations</b> (Consumables)                       |                         |                                                                                                                        |
| Office materials                                      | \$10,000                | Includes CNC and laser materials supporting 3x students                                                                |
| Raw materials                                         | \$56,280                | compared to year 1                                                                                                     |
| Tools to support daily curriculum                     | \$6,000                 | NA                                                                                                                     |
| Computers                                             | \$8,000                 | Calipers, micrometers and height gages to support 50 students                                                          |
| Printers/supplies                                     | \$1,000                 | Tablets to support 100 students                                                                                        |
| Transportation - Gas                                  | \$60,000                | No purchases made                                                                                                      |
| <b>Totals</b>                                         | <b>\$2,069,000</b>      | Bring students from school to training center                                                                          |



## Dashboard

June 2023

| Incentives Summary   |                |                                  |                |              |                |                          |                |
|----------------------|----------------|----------------------------------|----------------|--------------|----------------|--------------------------|----------------|
| Sales Tax Exemptions |                | Mortgage Recording Tax Exemption |                | PILOTS       |                | Total Company Investment |                |
| Year To Date         | Prior Year End | Year To Date                     | Prior Year End | Year To Date | Prior Year End | Year To Date             | Prior Year End |
| 13                   | 30             | 6                                | 17             | 8            | 17             | \$496,640,174            | \$738,190,997  |

| Jobs Summary             |                |                                        |                |                                 |                |                    |                |
|--------------------------|----------------|----------------------------------------|----------------|---------------------------------|----------------|--------------------|----------------|
| Number of Total Projects |                | Existing Jobs Retained per Application |                | New Jobs Projected by Applicant |                | New Jobs Required* |                |
| Year To Date             | Prior Year End | Year To Date                           | Prior Year End | Year To Date                    | Prior Year End | Year To Date       | Prior Year End |
| 13                       | 29             | 168                                    | 1948           | 129                             | 737            | 15                 | 245            |

| Fees for Approved Projects (includes all app and agency fees) |                  |                   |                  |                   |                  |
|---------------------------------------------------------------|------------------|-------------------|------------------|-------------------|------------------|
| Total                                                         |                  | Paid to Date      |                  | Outstanding       |                  |
| 2023 Projects YTD                                             | 2022 Projects YE | 2023 Projects YTD | 2022 Projects YE | 2023 Projects YTD | 2022 Projects YE |
| \$5,463,299                                                   | \$5,361,074      | \$63,959          | \$5,090,980      | \$5,399,340       | \$291,714        |

| Workforce Development Fund    |             |                 |             |              |             |
|-------------------------------|-------------|-----------------|-------------|--------------|-------------|
| Beginning Balance \$2,500,000 |             |                 |             |              |             |
| Allocated Revenue             |             | Committed Funds |             | Fund Balance |             |
| 2023 YTD                      | 2022 YE     | 2023 YTD        | 2022 YE     | 2022 YE      | 2023 YTD    |
| \$31,214                      | \$2,656,317 | \$300,000       | \$2,400,000 | \$2,756,317  | \$2,487,531 |

| Solar WD Fund         |                   |          |
|-----------------------|-------------------|----------|
| Fee Collected to Date | Committed to Date | Balance  |
| \$50,000              | \$0               | \$50,000 |

\*Required jobs are calculated as 10% of the existing jobs, with a minimum of 1 job. Enhanced JobsPlus is 100 jobs with a minimum of \$15,000,000 investment. There is no job creation requirement for projects that only receive sales tax exemptions.