



**Calallen ISD**

**Special Meeting**

**Monday, June 17, 2013 12:00 PM**

# Agenda of Special Meeting

## The Board of Trustees Calallen ISD

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A Special Meeting of the Board of Trustees of Calallen ISD will be held June 17, 2013, beginning at 12:00 PM in the Central Administration Office, 4205 Wildcat Dr., Corpus Christi, Texas.

The subjects to be discussed or considered or upon which any formal action may be taken are listed below. Items do not have to be taken in the same order as shown on this meeting notice. Unless removed from the consent agenda, items identified within the consent agenda will be acted on at one time.

1. Opening of Special Meeting by Chairman 3
2. New Business
  - A. Discuss and consider acceptance of application from Equistar Chemicals, LP. 4  
for an appraised value limitation on qualified property; authorize the  
Superintendent to review the application and submit to the Comptroller  
Presenter: Mrs. George
  - B. Discuss and consider approval to retain Moak Casey as consultants to assist the 75  
District in processing of application for appraised value limitation on qualified  
property from Equistar Chemicals, LP.  
Presenter: Mrs. George
  - C. Closed Session 79  
Presenter: Dr. Almendarez
  - D. Presentation of District Architect Report 80  
Presenter: Dr. Almendarez
  - E. Personnel - Appointments and resignations 82  
Presenter: Mrs. Felder
3. Adjourn



## **Calling the Meeting to Order**

**I call this meeting of the Calallen Independent School District Board of Trustees to order and let the record show that a quorum of Board Members is present and that this meeting was duly called and posted in accordance with the Texas Open Meetings Act, Texas Government Code 551.**

BOARD OF EDUCATION  
CALALLEN INDEPENDENT SCHOOL DISTRICT  
CORPUS CHRISTI, TEXAS

Date: June 17, 2013

Subject: Discuss and consider acceptance of application from Equistar Chemicals, LP. for an appraised value limitation on qualified property; authorize the Superintendent to review the application and submit to the Comptroller

New Business

**Action**

**BACKGROUND INFORMATION**

Equistar has requested a Chapter 313 agreement similar to the one that we entered into with TexStar. See attached agreement.

**ITEM ADDRESSED**

Discuss and consider acceptance of application from Equistar Chemicals, LP. for an appraised value limitation on qualified property; authorize the Superintendent to review the application and submit to the Comptroller

**RECOMMENDED ACTION**

The Administration recommends the Board accept the application from Equistar Chemicals, LP. for an appraised value limitation on qualified property; authorize the Superintendent to review the application and submit to the Comptroller.



# Application for Appraised Value Limitation on Qualified Property

(Tax Code, Chapter 313, Subchapter B or C)

**Form 50-296**  
(Revised May 2010)

**INSTRUCTIONS:** This application must be completed and filed with the school district. In order for an application to be processed, the governing body (school board) must elect to consider an application, but — by Comptroller rule — the school board may elect to consider the application only after the school district has received a completed application. Texas Tax Code, Section 313.025 requires that any completed application and any supplemental materials received by the school district must be forwarded within seven days to the Comptroller of Public Accounts.

If the school board elects to consider the application, the school district must:

- notify the Comptroller that the school board has elected to consider the application.  
This notice must include:
  - the date on which the school district received the application;
  - the date the school district determined that the application was complete;
  - the date the school board decided to consider the application; and
  - a request that the comptroller prepare an economic impact analysis of the application;
- provide a copy of the notice to the appraisal district;
- must complete the sections of the application reserved for the school district and provide information required in the Comptroller rules located at 34 Texas Administrative Code (TAC) Section 9.1054; and
- forward the original completed application to the Comptroller in a three-ring binder with tabs separating each section of the documents, in addition to an electronic copy on CD. See 34 TAC Chapter 9, Subchapter F.

The governing body may, at its discretion, allow the applicant to supplement or amend the application after the filing date, subject to the restrictions in 34 TAC Chapter 9, Subchapter F.

When the Comptroller receives the notice and required information from the school district, the Comptroller will publish all submitted application materials on its Web site. The Comptroller is authorized to treat some application information as confidential and withhold it from publication on the Internet. To do so, however, the information must be segregated and comply with the other requirements set out in the Comptroller rules as explained in the Confidentiality Notice below.

The Comptroller will independently determine whether the application has been completed according to the Comptroller's rules (34 TAC Chapter 9, Subchapter F). If the Comptroller finds the application is not complete, the Comptroller will request additional materials from the school district. When the Comptroller determines that the application is complete, it will send the school district a notice indicating so. The Comptroller will determine the eligibility of the project, make a recommendation to the school board regarding the application and prepare an economic impact evaluation by the 90th day after the Comptroller receives a complete application—as determined by the Comptroller.

The school board must approve or disapprove the application before the 151st day after the application review start date (the date the application is finally determined to be complete), unless an extension is granted. The Comptroller and school district are authorized to request additional information from the applicant that is reasonably necessary to complete the recommendation, economic impact evaluation or consider the application at any time during the application review period.

Please visit the Comptroller's Web site to find out more about the program at <http://www.window.state.tx.us/taxinfo/proptax/hb1200/index.html>. There are links on this Web page to the Chapter 313 statute, rules and forms. Information about minimum limitation values for particular districts and wage standards may also be found at that site.

## SCHOOL DISTRICT INFORMATION - CERTIFICATION OF APPLICATION

<b>Authorized School District Representative</b>		Date application received by district
First Name <b>Dr. Arturo</b>	Last Name <b>Almendarez</b>	
Title <b>Superintendent</b>		
School District Name <b>Calallen ISD</b>		
Street Address <b>4205 Wildcat Drive</b>		
Mailing Address <b>4205 Wildcat Drive</b>		
City <b>Corpus Christi</b>	State <b>TX</b>	ZIP <b>78410</b>
Phone Number <b>361-242-5600</b>	Fax Number <b>361-242-5620</b>	
Mobile Number (optional)	E-mail Address <b>AAIAlmendarez@calallen.org</b>	

I authorize the consultant to provide and obtain information related to this application.....  Yes  No

Will consultant be primary contact? .....  Yes  No



SCHOOL DISTRICT INFORMATION - CERTIFICATION OF APPLICATION (CONTINUED)

Authorized School District Consultant (If Applicable)

First Name <b>Daniel T.</b>	Last Name <b>Casey</b>	
Title <b>Partner</b>		
Firm Name <b>Moak Casey &amp; Associates LLP</b>		
Street Address <b>400 W. 15th Street, Suite 1410</b>		
Mailing Address <b>400 W. 15th Street, Suite 1410</b>		
City <b>Austin</b>	State <b>TX</b>	ZIP <b>78701</b>
Phone Number <b>512-485-7878</b>	Fax Number <b>512-485-7888</b>	
Mobile Number (Optional)	E-mail Address <b>dcasey@moakcasey.com</b>	

I am the authorized representative for the school district to which this application is being submitted. I understand that this application is a government record as defined in Chapter 37 of the Texas Penal Code.

Signature (Authorized School District Representative)	Date
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Has the district determined this application complete?  Yes  No

If yes, date determined complete. \_\_\_\_\_

Have you completed the school finance documents required by TAC 9.1054(c)(3)?  Yes  No

SCHOOL DISTRICT CHECKLIST AND REQUESTED ATTACHMENTS

	Checklist	Page X of 16	Check Completed
1	Date application received by the ISD	1 of 16	
2	Certification page signed and dated by authorized school district representative	2 of 16	
3	Date application deemed complete by ISD	2 of 16	
4	Certification pages signed and dated by applicant or authorized business representative of applicant	4 of 16	✓
5	Completed company checklist	12 of 16	✓
6	School finance documents described in TAC 9.1054(c)(3) (Due within 20 days of district providing notice of completed application)	2 of 16	



APPLICANT INFORMATION - CERTIFICATION OF APPLICATION

Authorized Business Representative (Applicant)

First Name <b>Stephen R.</b>		Last Name <b>Wessels</b>	
Title <b>Assistant Secretary &amp; Chief Tax Counsel</b>			
Organization <b>Equistar Chemicals, LP</b>			
Street Address <b>1221 McKinney Street, Suite 700, Houston, TX 77010</b>			
Mailing Address <b>P.O. Box 3646</b>			
City <b>Houston</b>		State <b>TX</b>	ZIP <b>77253-3646</b>
Phone Number <b>713-309-2295</b>		Fax Number	
Mobile Number (optional)		Business e-mail Address <b>Stephen.Wessels@lyondellbasell.com</b>	

Will a company official other than the authorized business representative be responsible for responding to future information requests?  Yes  No

If yes, please fill out contact information for that person.

First Name		Last Name	
Title			
Organization			
Street Address			
Mailing Address			
City		State	ZIP
Phone Number		Fax Number	
Mobile Number (optional)		E-mail Address	

I authorize the consultant to provide and obtain information related to this application..  Yes  No

Will consultant be primary contact?  Yes  No



APPLICANT INFORMATION - CERTIFICATION OF APPLICATION (CONTINUED)

Authorized Company Consultant (If Applicable)

First Name <b>D. Dale</b>		Last Name <b>Cummings</b>	
Title <b>Partner</b>			
Firm Name <b>Cummings Westlake LLC</b>			
Street Address <b>12837 Louetta Road, Suite 201</b>			
Mailing Address <b>12837 Louetta Road, Suite 201</b>			
City <b>Cypress</b>		State <b>TX</b>	ZIP <b>77429</b>
Phone Number <b>713-266-4456 x1</b>		Fax Number <b>713-266-2333</b>	
Business email Address <b>dcummings@cwlp.net</b>			

I am the authorized representative for the business entity for the purpose of filing this application. I understand that this application is a government record as defined in Chapter 37 of the Texas Penal Code. The information contained in this application is true and correct to the best of my knowledge and belief.

I hereby certify and affirm that the business entity I represent is in good standing under the laws of the state in which the business entity was organized and that no delinquent taxes are owed to the State of Texas.

Signature (Authorized Business Representative (Applicant)) <i>Stephen R. Ward</i>	Date <b>June 10, 2013</b>
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GIVEN under my hand and seal of office this 10<sup>th</sup> day of June 2013.



*Brian David*  
Notary Public, State of Texas

My commission expires 2-19-2017

If you make a false statement on this application, you could be found guilty of a Class A misdemeanor or a state jail felony under Texas Penal Code § 37.10.



FEES AND PAYMENTS

Enclosed is proof of application fee paid to the school district.

For the purpose of this question, "payments to the school district" include any and all payments or transfers of things of value made to the school district or to any person or persons in any form if such payment or transfer of thing of value being provided is in recognition of, anticipation of, or consideration for the agreement for limitation on appraised value.

Please answer only either A OR B:

A. Will any "payments to the school district" that you may make in order to receive a property tax value limitation agreement result in payments that are not in compliance with Tax Code, 313.027(i)?

B. If "payments to the school district" will only be determined by a formula or methodology without a specific amount being specified, could such method result in "payments to the school district" that are not in compliance with Tax Code §313.027(i)?

BUSINESS APPLICANT INFORMATION

Legal Name under which application is made

Equistar Chemicals, LP

Texas Taxpayer I.D. Number of entity subject to Tax Code, Chapter 171 (11 digits)

17605504814

NAICS code

325110

Is the applicant a party to any other Chapter 313 agreements?

If yes, please list name of school district and year of agreement.

Equistar Chemicals, LP has two applications in progress. One is at La Porte ISD and the other is at Sheldon ISD. Neither agreement has been executed at the time this application is filed with Calallen ISD.

APPLICANT BUSINESS STRUCTURE

Registered to do business in Texas with the Texas Secretary of State?

Identify business organization of applicant (corporation, limited liability corporation, etc.)

Limited Partnership

1. Is the applicant a combined group, or comprised of members of a combined group, as defined by Texas Tax Code Chapter 171.0001(7)?

2. Is the applicant current on all tax payments due to the State of Texas?

3. Are all applicant members of the combined group current on all tax payments due to the State of Texas?

If the answer to either question is no, please explain and/or disclose any history of default, delinquencies and/or any material litigation, including litigation involving the State of Texas. (Use attachment if necessary.)



ELIGIBILITY UNDER TAX CODE CHAPTER 313.024

- Are you an entity to which Tax Code, Chapter 171 applies?
The property will be used as an integral part, or as a necessary auxiliary part, in one of the following activities:
(1) manufacturing
(2) research and development.
(3) a clean coal project, as defined by Section 5.001, Water Code
(4) an advanced clean energy project, as defined by Section 382.003, Health and Safety Code
(5) renewable energy electric generation
(6) electric power generation using integrated gasification combined cycle technology.
(7) nuclear electric power generation
(8) a computer center that is used as an integral part or as a necessary auxiliary part for the activity conducted by applicant in one or more activities described by Subdivisions (1) through (7)
Are you requesting that any of the land be classified as qualified investment?
Will any of the proposed qualified investment be leased under a capitalized lease?
Will any of the proposed qualified investment be leased under an operating lease?
Are you including property that is owned by a person other than the applicant?
Will any property be pooled or proposed to be pooled with property owned by the applicant in determining the amount of your qualified investment?

PROJECT DESCRIPTION

Provide a detailed description of the scope of the proposed project, including, at a minimum, the type and planned use of real and tangible personal property, the nature of the business, a timeline for property construction or installation, and any other relevant information. (Use attachments as necessary)

See Attachment # 4

Describe the ability of your company to locate or relocate in another state or another region of the state.

See Attachment # 4A

PROJECT CHARACTERISTICS (CHECK ALL THAT APPLY)

- Checkboxes for: New Jobs, Relocation from Out-of-State, Consolidation, Construct New Facility, Expansion, Relocation within Texas, New Business / Start-up, Expand Existing Facility, Purchase Machinery & Equipment

PROJECTED TIMELINE

Begin Construction Q3 2014
Construction Complete Q4 2015
Purchase Machinery & Equipment Q3 2014 - Q3 2015
Begin Hiring New Employees Q3 2015
Fully Operational Q4 2015

Do you propose to construct a new building or to erect or affix a new improvement after your application review start date (date your application is finally determined to be complete)?

When do you anticipate the new buildings or improvements will be placed in service? Q4 2015



**ECONOMIC INCENTIVES**

Identify state programs the project will apply for:

State Source	Amount
N/A	
Total	

Will other incentives be offered by local units of government?  Yes  No

Please use the following box for additional details regarding incentives. (Use attachments if necessary.)

**THE PROPERTY**

Identify county or counties in which the proposed project will be located Nueces

Central Appraisal District (CAD) that will be responsible for appraising the property Nueces

Will this CAD be acting on behalf of another CAD to appraise this property?  Yes  No

List all taxing entities that have jurisdiction for the property and the portion of project within each entity

County: Nueces (100%) City: n/a  
(Name and percent of project) (Name and percent of project)

Hospital District: Nueces County (100%) Water District: n/a  
(Name and percent of project) (Name and percent of project)

Other (describe): See Attachment 5 Other (describe): n/a  
(Name and percent of project) (Name and percent of project)

Is the project located entirely within this ISD?  Yes  No

If not, please provide additional information on the project scope and size to assist in the economic analysis.



INVESTMENT

NOTE: The minimum amount of qualified investment required to qualify for an appraised value limitation and the minimum amount of appraised value limitation vary depending on whether the school district is classified as rural, and the taxable value of the property within the school district. For assistance in determining estimates of these minimums, access the Comptroller's Web site at www.window.state.tx.us/taxinfo/proptax/hb1200/values.html.

At the time of application, what is the estimated minimum qualified investment required for this school district? \$30,000,000

What is the amount of appraised value limitation for which you are applying? \$30,000,000

What is your total estimated qualified investment? \$490,994,000

NOTE: See 313.021(1) for full definition. Generally, Qualified Investment is the sum of the investment in tangible personal property and buildings and new improvements made between beginning of the qualifying time period (date of application final approval by the school district) and the end of the second complete tax year.

What is the anticipated date of application approval? November 1, 2013

What is the anticipated date of the beginning of the qualifying time period? November 1, 2013

What is the total estimated investment for this project for the period from the time of application submission to the end of the limitation period? \$490,994,000

Describe the qualified investment.[See 313.021(1).]

Attach the following items to this application:

- (1) a specific and detailed description of the qualified investment you propose to make on the property for which you are requesting an appraised value limitation as defined by Tax Code §313.021,
(2) a description of any new buildings, proposed improvements or personal property which you intend to include as part of your minimum qualified investment and
(3) a map of the qualified investment showing location of new buildings or new improvements with vicinity map.

Do you intend to make at least the minimum qualified investment required by Tax Code §313.023 (or 313.053 for rural school districts) for the relevant school district category during the qualifying time period? [X] Yes [ ] No

Except for new equipment described in Tax Code §151.318(q) or (q-1), is the proposed tangible personal property to be placed in service for the first time:

- (1) in or on the new building or other new improvement for which you are applying? [X] Yes [ ] No
(2) if not in or on the new building or other new improvement for which you are applying for an appraised value limitation, is the personal property necessary and ancillary to the business conducted in the new building or other new improvement? [X] Yes [ ] No
(3) on the same parcel of land as the building for which you are applying for an appraised value limitation? [X] Yes [ ] No

("First placed in service" means the first use of the property by the taxpayer.)

Will the investment in real or personal property you propose be counted toward the minimum qualified investment required by Tax Code §313.023, (or 313.053 for rural school districts) be first placed in service in this state during the applicable qualifying time period? [X] Yes [ ] No

Does the investment in tangible personal property meet the requirements of Tax Code §313.021(1)? [X] Yes [ ] No

If the proposed investment includes a building or a permanent, non-removable component of a building, does it house tangible personal property? [X] Yes [ ] No

QUALIFIED PROPERTY

Describe the qualified property. [See 313.021(2)] (If qualified investment describes qualified property exactly you may skip items (1), (2) and (3) below.)

Attach the following items to this application:

- (1) a specific and detailed description of the qualified property for which you are requesting an appraised value limitation as defined by Tax Code §313.021,
(2) a description of any new buildings, proposed improvements or personal property which you intend to include as part of your qualified property and
(3) a map of the qualified property showing location of new buildings or new improvements – with vicinity map.

Land

Is the land on which you propose new construction or improvements currently located in an area designated as a reinvestment zone under Tax Code Chapter 311 or 312 or as an enterprise zone under Government Code Chapter 2303? [ ] Yes [X] No

If you answered "no" to the question above, what is the anticipated date on which you will submit proof of a reinvestment zone with boundaries encompassing the land on which you propose new construction or improvements? October 15, 2013

Will the applicant own the land by the date of agreement execution? [X] Yes [ ] No

Will the project be on leased land? [ ] Yes [X] No



QUALIFIED PROPERTY (CONTINUED)

If the land upon which the new building or new improvement is to be built is part of the qualified property described by §313.021(2)(A), please attach complete documentation, including:

- 1. Legal description of the land
2. Each existing appraisal parcel number of the land on which the improvements will be constructed, regardless of whether or not all of the land described in the current parcel will become qualified property
3. Owner
4. The current taxable value of the land. Attach estimate if land is part of larger parcel.
5. A detailed map (with a vicinity map) showing the location of the land

Attach a map of the reinvestment zone boundaries, certified to be accurate by either the governmental entity creating the zone, the local appraisal district, or a licensed surveyor. (With vicinity map)

Attach the order, resolution or ordinance establishing the zone, and the guidelines and criteria for creating the zone, if applicable.

Miscellaneous

Is the proposed project a building or new improvement to an existing facility? [X] Yes [ ] No

Attach a description of any existing improvements and include existing appraisal district account numbers.

List current market value of existing property at site as of most recent tax year. See Attachment 12 (Market Value) 2012 (Tax Year)

Is any of the existing property subject to a value limitation agreement under Tax Code 313? [ ] Yes [X] No

Will all of the property for which you are requesting an appraised value limitation be free of a tax abatement agreement entered into by a school district for the duration of the limitation? [X] Yes [ ] No

WAGE AND EMPLOYMENT INFORMATION

What is the estimated number of permanent jobs (more than 1,600 hours a year), with the applicant or a contractor of the applicant, on the proposed qualified property during the last complete quarter before the application review start date (date your application is finally determined to be complete)? 169

The last complete calendar quarter before application review start date is the:

[X] First Quarter [ ] Second Quarter [ ] Third Quarter [ ] Fourth Quarter of 2013 (year)

What were the number of permanent jobs (more than 1,600 hours a year) this applicant had in Texas during the most recent quarter reported to the TWC? 1,835

Note: For job definitions see TAC §9.1051(14) and Tax Code 313.021(3). If the applicant intends to apply a definition for "new job" other than TAC §9.1051(14)(C), then please provide the definition of "new job" as used in this application. Not applicable

Total number of new jobs that will have been created when fully operational 3

Do you plan to create at least 25 new jobs (at least 10 new jobs for rural school districts) on the land and in connection with the new building or other improvement? [ ] Yes [X] No

Do you intend to request that the governing body waive the minimum new job creation requirement, as provided under Tax Code §313.025(f-1)? [X] Yes [ ] No

If you answered "yes" to the question above, attach evidence documenting that the new job creation requirement above exceeds the number of employees necessary for the operation, according to industry standards. Note: Even if a minimum new job waiver is provided, 80% of all new jobs must be qualifying jobs pursuant to Texas Tax Code, §313.024(d).

What is the maximum number of qualifying jobs meeting all criteria of §313.021(3) you are committing to create? 3

If this project creates more than 1,000 new jobs, the minimum required wage for this project is 110% of the average county weekly wage for all jobs as described by 313.021(3)(E)(ii).

If this project creates less than 1,000 new jobs, does this district have territory in a county that meets the demographic characteristics of 313.051(2)? (see table of information showing this district characteristic at http://www.window.state.tx.us/taxinfo/proptax/hb1200/values.html)

If yes, the applicant must meet wage standard described in 313.051(b) (110% of the regional average weekly wage for manufacturing)

If no, the applicant shall designate one of the wage standards set out in §§313.021(5)(A) or 313.021(5)(B).



WAGE AND EMPLOYMENT INFORMATION (CONTINUED)

For the following three wage calculations please include on an attachment the four most recent quarters of data for each wage calculation. Show the average and the 110% calculation. Include documentation from TWC Web site. The final actual statutory minimum annual wage requirement for the applicant for each qualifying job — which may differ slightly from this estimate — will be based on information from the four quarterly periods for which data were available at the time of the application review start date (date of a completed application). See TAC §9.1051(7).

110% of the county average weekly wage for all jobs (all industries) in the county is \$910

110% of the county average weekly wage for manufacturing jobs in the county is \$1,457

110% of the county average weekly wage for manufacturing jobs in the region is \$983

Please identify which Tax Code section you are using to estimate the wage standard required for this project:

☐ §313.021(5)(A) or ☑ §313.021(5)(B) or ☐ §313.021(3)(E)(ii), or ☐ §313.051(b)?

What is the estimated minimum required annual wage for each qualifying job based on the qualified property? \$51,138

What is the estimated minimum required annual wage you are committing to pay for each of the qualifying jobs you create on the qualified property? \$65,000

Will 80% of all new jobs created by the owner be qualifying jobs as defined by 313.021(3)? ☑ Yes ☐ No

Will each qualifying job require at least 1,600 of work a year? ☑ Yes ☐ No

Will any of the qualifying jobs be jobs transferred from one area of the state to another? ☐ Yes ☑ No

Will any of the qualifying jobs be retained jobs? ☐ Yes ☑ No

Will any of the qualifying jobs be created to replace a previous employee? ☐ Yes ☑ No

Will any required qualifying jobs be filled by employees of contractors? ☐ Yes ☑ No

If yes, what percent? \_\_\_\_\_

Does the applicant or contractor of the applicant offer to pay at least 80% of the employee's health insurance premium for each qualifying job? ☑ Yes ☐ No

Describe each type of benefits to be offered to qualifying jobholders. (Use attachments as necessary.)

See Attachment 15

ECONOMIC IMPACT

Is an Economic Impact Analysis attached (If supplied by other than the Comptroller's office)? ☐ Yes ☑ No

Is Schedule A completed and signed for all years and attached? ☑ Yes ☐ No

Is Schedule B completed and signed for all years and attached? ☑ Yes ☐ No

Is Schedule C (Application) completed and signed for all years and attached? ☑ Yes ☐ No

Is Schedule D completed and signed for all years and attached? ☑ Yes ☐ No

Note: Excel spreadsheet versions of schedules are available for download and printing at URL listed below.

If there are any other payments made in the state or economic information that you believe should be included in the economic analysis, please attach a separate schedule showing the amount for each year affected, including an explanation.



## CONFIDENTIALITY NOTICE

### Property Tax Limitation Agreement Applications Texas Government Code Chapter 313 Confidential Information Submitted to the Comptroller

Generally, an application for property tax value limitation, the information provided therein, and documents submitted in support thereof, are considered public information subject to release under the Texas Public Information Act.

There is an exception, outlined below, by which information will be withheld from disclosure.

The Comptroller's office will withhold information from public release if:

- 1) it describes the specific processes or business activities to be conducted or the specific tangible personal property to be located on real property covered by the application;
- 2) the information has been segregated in the application from other information in the application; and
- 3) the party requesting confidentiality provides the Comptroller's office a list of the documents for which confidentiality is sought and for each document lists the specific reasons, including any relevant legal authority, stating why the material is believed to be confidential.

All applications and parts of applications which are not segregated and marked as confidential as outlined above will be considered public information and will be posted on the internet.

Such information properly identified as confidential will be withheld from public release unless and until the governing body of the school district acts on the application, or we are directed to do so by a ruling from the Attorney General.

Other information in the custody of a school district or the comptroller submitted in connection with the application, including information related to the economic impact of a project or the essential elements of eligibility under Texas Tax Code, Chapter 313, such as

the nature and amount of the projected investment, employment, wages, and benefits, will not be considered confidential business information and will be posted on the internet.

All documents submitted to the Comptroller, as well as all information in the application once the school district acts thereon, are subject to public release unless specific parts of the application or documents submitted with the application are identified as confidential. Any person seeking to limit disclosure of such submitted records is advised to consult with their legal counsel regarding disclosure issues and also to take the appropriate precautions to safeguard copyrighted material, trade secrets, or any other proprietary information. The Comptroller assumes no obligation or responsibility relating to the disclosure or nondisclosure of information submitted by respondents. A person seeking to limit disclosure of information must submit in writing specific detailed reasons, including any relevant legal authority, stating why that person believes the material to be confidential.

The following outlines how the Comptroller's office will handle requests for information submitted under the Texas Public Information Act for application portions and submitted records appropriately identified as confidential.

- This office shall forward the request for records and a copy of the documents at issue to the Texas Attorney General's office for an opinion on whether such information may be withheld from disclosure under the Texas Public Information Act.
- The Comptroller will notify the person who submitted the application/documents when the information is forwarded to the Attorney General's office.
- Please be aware that this Office is obligated to comply with an Attorney General's decision, including release of information ruled public even if it was marked confidential.



## COMPANY CHECKLIST AND REQUESTED ATTACHMENTS

	Checklist	Page X of 16	Check Completed
1	Certification pages signed and dated by Authorized Business Representative (applicant)	4 of 16	✓
2	Proof of Payment of Application Fee (Attachment)	5 of 16	✓
3	For applicant members, documentation of Combined Group membership under Texas Tax Code 171.0001(7) (if Applicable) (Attachment)	5 of 16	✓
4	Detailed description of the project	6 of 16	✓
5	If project is located in more than one district, name other districts and list percentage in each district (Attachment)	7 of 16	✓
6	Description of Qualified Investment (Attachment)	8 of 16	✓
7	Map of qualified investment showing location of new buildings or new improvements with vicinity map.	8 of 16	✓
8	Description of Qualified Property (Attachment)	8 of 16	✓
9	Map of qualified property showing location of new buildings or new improvements with vicinity map	8 of 16	✓
10	Description of Land (Attachment)	9 of 16	✓
11	A detailed map showing location of the land with vicinity map.	9 of 16	✓
12	A description of all existing (if any) improvements (Attachment)	9 of 16	✓
13	Request for Waiver of Job Creation Requirement (if applicable) (Attachment)	9 of 16	✓
14	Calculation of three possible wage requirements with TWC documentation. (Attachment)	10 of 16	✓
15	Description of Benefits	10 of 16	✓
16	Economic Impact (if applicable)	10 of 16	✓
17	Schedule A completed and signed	13 of 16	✓
18	Schedule B completed and signed	14 of 16	✓
19	Schedule C (Application) completed and signed	15 of 16	✓
20	Schedule D completed and signed	16 of 16	✓
21	Map of Reinvestment Zone (Attachment) (Showing the actual or proposed boundaries and size, Certified to be accurate by either the government entity creating the zone, the local appraisal district, or a licensed surveyor, with vicinity map)*	9 of 16	✓
22	Order, Resolution, or Ordinance Establishing the Zone (Attachment)*	9 of 16	✓
23	Legal Description of Reinvestment Zone (Attachment)*	9 of 16	✓
24	Guidelines and Criteria for Reinvestment Zone(Attachment)*	9 of 16	✓

\*To be submitted with application or before date of final application approval by school board.

**Schedule A (Rev. January 2013): Investment**

**Applicant Name** EQUICSTAR CHEMICALS, LP  
**ISD Name** CALALLEN ISD

**Form 50-296**

**PROPERTY INVESTMENT AMOUNTS**

(Estimated investment in each year. Do not put cumulative totals.)

	Year	School Year (YYYY-YYYY)	Tax Year (Fill in actual tax year below) YYYY	Column A:	Column B:	Column C:	Column D:	Column E:	
				Tangible Personal Property The amount of new investment (original cost) placed in service during this year	Building or permanent nonremovable component of building (annual amount only)	Sum of A and B Qualifying investment (during the qualifying time period)	Other investment that is not qualified investment but investment affecting economic impact and total value	Total Investment (A+B+D)	
The year preceding the first complete tax year of the qualifying time period (assuming no deferrals)	Investment made before filing complete application with district (neither qualified property nor eligible to become qualified investment)	2013-2014	2013	0	0	0	0	0	
	Investment made after filing complete application with district, but before final board approval of application (eligible to become qualified property)			-	-	-	-	-	
	Investment made after final board approval of application and before Jan 1 of first complete tax year of qualifying time period (qualified investment and eligible to become qualified property)			\$ 30,319,000	\$ -	\$ 30,319,000	0	\$ 30,319,000	
Complete tax years of qualifying time period	1	2014-2015	2014	\$ 140,080,000	\$ -	\$ 140,080,000	0	\$ 140,080,000	
	2	2015-2016	2015	\$ 320,595,000	\$ -	\$ 320,595,000	0	\$ 320,595,000	
Tax Credit Period (with 50% cap on credit)	Value Limitation Period	3	2016-2017	2016	\$ 1,750,000	\$ -	\$ 1,750,000	0	\$ 1,750,000
		4	2017-2018	2017	0	0	0	0	-
		5	2018-2019	2018	0	0	0	0	0
		6	2019-2020	2019	0	0	0	0	0
		7	2020-2021	2020	0	0	0	0	0
		8	2021-2022	2021	0	0	0	0	0
		9	2022-2023	2022	0	0	0	0	0
		10	2023-2004	2023	0	0	0	0	0
Credit Settle-Up Period	Continue to Maintain Viable Presence	11	2024-2025	2024	0	0	0	0	0
		12	2025-2026	2025	0	0	0	0	0
		13	2026-2027	2026	0	0	0	0	0
Post- Settle-Up Period		14	2027-2028	2027	0	0	0	0	
Post- Settle-Up Period		15	2028-2029	2028	0	0	0	0	

Qualifying Time Period usually begins with the final board approval of the application and extends generally for the following two complete tax years

Column A: This represents the total dollar amount of planned investment in tangible personal property the applicant considers qualified investment - as defined in Tax Code §313.021(1)(A)-(D).

For the purposes of investment, please list amount invested each year, not cumulative totals.  
 [For the years outside the qualifying time period, this number should simply represent the planned investment in tangible personal property].

Column B: Include estimates of investment for "replacement" property-property that is part of original agreement but scheduled for probable replacement during limitation period.  
 The total dollar amount of planned investment each year in buildings or nonremovable component of buildings that the applicant considers qualified investment under Tax Code §313.021(1)(E).

Column D: For the years outside the qualifying time period, this number should simply represent the planned investment in new buildings or nonremovable components of buildings.  
 Dollar value of other investment that may not be qualified investment but that may affect economic impact and total value-for planning, construction and operation of the facility.

The most significant example for many projects would be land. Other examples may be items such as professional services, etc.  
 Note: Land can be listed as part of investment during the "pre-year 1" time period. It cannot be part of qualifying investment.

Notes: For advanced clean energy projects, nuclear projects, projects with deferred qualifying time periods, and projects with lengthy application review periods. Insert additional rows as needed.

This schedule must be submitted with the original application and any application for tax credit. When using this schedule for any purpose other than the original application, replace original estimates with actual appraisal district data for past years and update estimates for current and future years. If original estimates have not changed, enter those amounts for future years.

Stephen R. Ward  
 SIGNATURE OF AUTHORIZED COMPANY REPRESENTATIVE

JUNE 10, 2013  
 DATE

**Schedule B (Rev. January 2013): Estimated Market And Taxable Value**  
**EQUISTAR CHEMICALS, LP**

Applicant Name  
 ISD Name

CALALLEN ISD

Form 50-296

		Year	School Year (YYYY-YYYY)	Tax Year (Fill in actual tax year) YYYY	Qualified Property			Reductions from Market Value	Estimated Taxable Value	
					Estimated Market Value of Land	Estimated Total Market Value of new buildings or other new improvements	Estimated Total Market Value of tangible personal property in the new building or "in or on the new improvement"	Exempted Value	Final taxable value for I&S - after all reductions	Final taxable value for M&O--after all reductions
		pre- year 1	2013-2014	2013	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Complete tax years of qualifying time period	1	2014-2015	2014	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		2	2015-2016	2015	\$ -	\$ -	\$ 85,200,000	\$ 4,260,000	\$ 80,940,000	\$ 80,940,000
Tax Credit Period (with 50% cap on credit)	Value Limitation Period	3	2016-2017	2016	\$ -	\$ -	\$ 491,000,000	\$ 24,550,000	\$ 466,450,000	\$ 30,000,000
		4	2017-2018	2017	\$ -	\$ -	\$ 492,744,000	\$ 24,637,000	\$ 468,107,000	\$ 30,000,000
		5	2018-2019	2018	\$ -	\$ -	\$ 473,034,000	\$ 23,652,000	\$ 449,382,000	\$ 30,000,000
		6	2019-2020	2019	\$ -	\$ -	\$ 454,113,000	\$ 22,706,000	\$ 431,407,000	\$ 30,000,000
		7	2020-2021	2020	\$ -	\$ -	\$ 435,948,000	\$ 21,797,000	\$ 414,151,000	\$ 30,000,000
		8	2021-2022	2021	\$ -	\$ -	\$ 418,510,000	\$ 20,926,000	\$ 397,584,000	\$ 30,000,000
		9	2022-2023	2022	\$ -	\$ -	\$ 401,770,000	\$ 20,089,000	\$ 381,681,000	\$ 30,000,000
		10	2023-2004	2023	\$ -	\$ -	\$ 385,699,000	\$ 19,285,000	\$ 366,414,000	\$ 30,000,000
Credit Settle-Up Period	Continue to Maintain Viable Presence	11	2024-2025	2024	\$ -	\$ -	\$ 370,271,000	\$ 18,514,000	\$ 351,757,000	\$ 351,757,000
		12	2025-2026	2025	\$ -	\$ -	\$ 355,460,000	\$ 17,773,000	\$ 337,687,000	\$ 337,687,000
		13	2026-2027	2026	\$ -	\$ -	\$ 341,242,000	\$ 17,062,000	\$ 324,180,000	\$ 324,180,000
Post- Settle-Up Period		14	2027-2028	2027	\$ -	\$ -	\$ 327,592,000	\$ 16,380,000	\$ 311,212,000	\$ 311,212,000
Post- Settle-Up Period		15	2028-2029	2028	\$ -	\$ -	\$ 314,488,000	\$ 15,724,000	\$ 298,764,000	\$ 298,764,000

Notes: Market value in future years is good faith estimate of future taxable value for the purposes of property taxation.  
 This schedule must be submitted with the original application and any application for tax credit. When using this schedule for any purpose other than the original application, replace original estimates with actual appraisal district data for past years and update estimates for current and future years. If original estimates have not changed, enter those amounts for future years.

*Stephen R. Ward*

SIGNATURE OF AUTHORIZED COMPANY REPRESENTATIVE

*June 10, 2013*

DATE

**Schedule C- Application: Employment Information**

**Applicant Name** EQUICSTAR CHEMICALS, LP  
**ISD Name** CALALLEN ISD

Form 50-296

		Year	School Year (YYYY-YYYY)	Tax Year (Fill in actual tax year) YYYY	Construction		New Jobs		Qualifying Jobs	
					Column A: Number of Construction FTE's or man- hours (specify)	Column B: Average annual wage rates for construction workers	Column C: Number of new jobs applicant commits to create (cumulative)	Column D: Average annual wage rate for all new jobs.	Column E: Number of qualifying jobs applicant commits to create meeting all criteria of Sec. 313.021(3) (cumulative)	Column F: Average annual wage of qualifying jobs
		pre- year 1	2013-2014	2013	0 FTEs	\$0	0	\$0	0	\$0
	Complete tax years of qualifying time period	1	2014-2015	2014	200 FTEs	\$100,000	0	\$0	0	\$0
		2	2015-2016	2015	335 FTEs	\$100,000	3	\$65,000	3	\$65,000
Tax Credit Period (with 50% cap on credit)	Value Limitation Period	3	2016-2017	2016			3	\$65,000	3	\$65,000
		4	2017-2018	2017			3	\$65,000	3	\$65,000
		5	2018-2019	2018			3	\$65,000	3	\$65,000
		6	2019-2020	2019			3	\$65,000	3	\$65,000
		7	2020-2021	2020			3	\$65,000	3	\$65,000
		8	2021-2022	2021			3	\$65,000	3	\$65,000
		9	2022-2023	2022			3	\$65,000	3	\$65,000
		10	2023-2004	2023			3	\$65,000	3	\$65,000
Credit Settle-Up Period	Continue to Maintain Viable Presence	11	2024-2025	2024			3	\$65,000	3	\$65,000
		12	2025-2026	2025			3	\$65,000	3	\$65,000
		13	2026-2027	2026			3	\$65,000	3	\$65,000
Post- Settle-Up Period		14	2027-2028	2027			3	\$65,000	3	\$65,000
Post- Settle-Up Period		15	2028-2029	2028			3	\$65,000	3	\$65,000

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

This schedule must be submitted with the original application and any application for tax credit. When using this schedule for any purpose other than the original application, replace original estimates with actual appraisal district data for past years and update estimates for current and future years. If original estimates have not changed, enter those amounts for future years.

*Stephen R. Woods*

SIGNATURE OF AUTHORIZED COMPANY REPRESENTATIVE

*June 10, 2013*

DATE

**Schedule D: (Rev. January 2013): Other Tax Information**

**Applicant Name**

EQUISTAR CHEMICALS, LP

**ISD Name**

CALLEN ISD

**Form 50-296**

					Sales Tax Information		Franchise Tax	Other Property Tax Abatements Sought			
					Sales Taxable Expenditures		Franchise Tax	County	City	Hospital	Other
		Year	School Year (YYYY-YYYY)	Tax/Calendar Year YYYY	Column F: Estimate of total annual expenditures* subject to state sales tax	Column G: Estimate of total annual expenditures* made in Texas NOT subject to sales tax	Column H: Estimate of Franchise tax due from (or attributable to) the applicant	Fill in percentage exemption requested or granted in each year of the Agreement	Fill in percentage exemption requested or granted in each year of the Agreement	Fill in percentage exemption requested or granted in each year of the Agreement	Fill in percentage exemption requested or granted in each year of the Agreement
The year preceding the first complete tax year of the qualifying time period (assuming no deferrals)			2013-2014	2013	2,652,000	27,667,000	0	-	-	-	-
	Complete tax years of qualifying time period	1	2014-2015	2014	\$ 12,254,000	127,826,000	0	n/a	n/a	n/a	n/a
		2	2015-2016	2015	\$ 28,044,000	292,551,000	35,000	n/a	n/a	n/a	n/a
		3	2016-2017	2016	\$ 153,000	1,597,000	900,000	n/a	n/a	n/a	n/a
Tax Credit Period (with 50% cap on credit)	Value Limitation Period	4	2017-2018	2017	\$ -	\$ -	465,000	n/a	n/a	n/a	n/a
		5	2018-2019	2018	\$ -	\$ -	575,000	n/a	n/a	n/a	n/a
		6	2019-2020	2019	\$ -	\$ -	500,000	n/a	n/a	n/a	n/a
		7	2020-2021	2020	\$ -	\$ -	435,000	n/a	n/a	n/a	n/a
		8	2021-2022	2021	\$ -	\$ -	395,000	n/a	n/a	n/a	n/a
		9	2022-2023	2022	\$ -	\$ -	560,000	n/a	n/a	n/a	n/a
		10	2023-2004	2023	\$ -	\$ -	510,000	n/a	n/a	n/a	n/a
Credit Settle-Up Period	Continue to Maintain Viable Presence	11	2024-2025	2024	\$ -	\$ -	550,000	n/a	n/a	n/a	n/a
		12	2025-2026	2025	\$ -	\$ -	585,000	n/a	n/a	n/a	n/a
		13	2026-2027	2026	\$ -	\$ -	630,000	n/a	n/a	n/a	n/a
Post- Settle-Up Period		14	2027-2028	2027	\$ -	\$ -	560,000	n/a	n/a	n/a	n/a
Post- Settle-Up Period		15	2028-2029	2028	\$ -	\$ -	710,000	n/a	n/a	n/a	n/a

\*For planning, construction and operation of the facility.

*Stephen R. Ward*  
SIGNATURE OF AUTHORIZED COMPANY REPRESENTATIVE

*June 10, 2013*  
DATE

**ATTACHMENT 1**

See application

**ATTACHMENT 2**

Copy of check attached

**ATTACHMENT 3**

See attached documentation of combined group membership



Comptroller  
of Public  
Accounts  
FORM

05-165  
(Rev.9-11/3)

### Texas Franchise Tax Extension Affiliate List

■ Tcode 13298

■ Reporting entity taxpayer number

1 7 6 0 5 5 0 4 8 1 4

■ Report year

2 0 1 2

Reporting entity taxpayer name

EQUISTAR CHEMICALS, LP & AFFILIATES

LEGAL NAME OF AFFILIATE	AFFILIATE'S TEXAS TAXPAYER NUMBER (If none, enter FEI number)	BLACKEN CIRCLE IF AFFILIATE DOES NOT HAVE NEXUS IN TEXAS
1. LYONDELLBASELL FINANCE COMPANY	7 5 3 2 6 0 8 0 6	■ ○
2. LYONDELL CHEMICAL COMPANY	1 9 5 4 1 6 0 5 5 8 0	■ ○
3. EQUISTAR GP, LLC	3 2 0 4 1 2 5 3 5 3 8	■ ○
4. EQUISTAR LP, LLC	2 7 1 1 9 1 0 1 7	■ ○
5. LYONDELL CHEMICAL OVERSEAS SERVICE, INC.	3 2 0 0 3 4 9 7 0 0 8	■ ○
6. LYONDELL CHEMICAL DELAWARE COMPANY	5 1 0 3 0 9 0 9 4	■ ○
7. LYONDELL CHEMICAL HOLDING COMPANY	5 1 0 3 2 9 8 0 0	■ ○
8. LYONDELL CHEMICAL INTERNATIONAL COMPANY	5 1 0 1 0 9 8 0 3	■ ○
9. LYONDELL CENTENNIAL CORP.	9 5 3 0 4 6 2 7 2	■ ○
10. LYONDELL CHEMICAL TECHNOLOGY, L.P.	3 2 0 3 6 4 6 8 6 0 4	■ ○
11. LYONDELL CHEMICAL TECHNOLOGY MANAGEMENT, INC	1 2 3 2 6 3 1 3 8 9 4	■ ○
12. LYONDELL CHEMICAL PROPERTIES, L.P.	2 3 2 8 3 6 1 0 5	■ ○
13. LYONDELL POTECHGP, INC.	3 2 0 3 8 7 9 7 6 7 9	■ ○
14. LYONDELL POTECHLP, INC	5 1 0 3 9 7 8 2 4	■ ○
15. LYONDELL CHEMICAL TECHNOLOGY 1 INC.	5 6 2 5 6 1 5 8 8	■ ○
16. POSM DELAWARE, INC.	3 0 1 1 4 1 5 9 2 9 3	■ ○
17. LYONDELLBASELL ACETYLS HOLDCO, LLC	2 7 1 1 9 1 1 3 3	■ ○
18. LYONDELLBASELL ACETYLS, LLC	1 2 7 1 1 9 1 2 3 3 2	■ ○
19. LYONDELLBASELL F&F HOLDCO, INC.	2 7 1 1 9 1 3 2 0	■ ○
20. LYONDELL REFINING COMPANY LLC	3 2 0 2 8 1 5 4 1 1 3	■ ○
21. LYONDELLBASELL METHANOL LP, INC.	2 2 3 4 5 2 6 2 6	■ ○

Note: To file an extension request for a reporting entity and its affiliates, Form 05-164 (Texas Franchise Tax Extension Request) must be submitted with this affiliate list. The filing of this list by itself does not constitute a properly filed Extension Request.

Do not file this form when requesting a second extension.

Texas Comptroller Official Use Only

VE/DE  FM





Comptroller  
of Public  
Accounts  
FORM

05-165  
(Rev.9-11/3)

■ Tcode 13298

# Texas Franchise Tax Extension Affiliate List

■ Reporting entity taxpayer number

1 7 6 0 5 5 0 4 8 1 4

■ Report year

2 0 1 2

Reporting entity taxpayer name

EQUISTAR CHEMICALS, LP & AFFILIATES

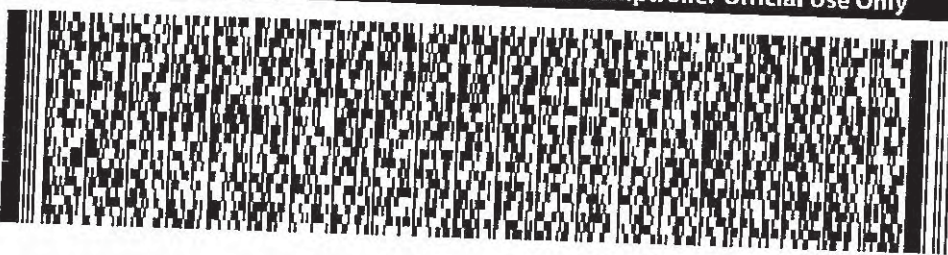
LEGAL NAME OF AFFILIATE	AFFILIATE'S TEXAS TAXPAYER NUMBER (If none, enter FEI number)										BLACKEN CIRCLE IF AFFILIATE DOES NOT HAVE NEXUS IN TEXAS	
22. BASELL NORTH AMERICA INC.	5	1	0	2	7	2	0	9	0			■ ○
23. HOUSTON REFINING LP	1	7	6	0	3	9	5	3	0	3	9	■ ○
24. LAPORTE METHANOL COMPANY, L.P.	1	7	6	0	5	9	8	7	5	1	4	■ ○
25. TECHNOLOGY JV, LP	3	2	0	3	6	6	5	5	4	3	2	■ ○
26. PO JV, LP	1	5	1	0	3	9	8	5	1	7	0	■ ○
27. POSM II LIMITED PARTNERSHIP, L.P.	3	2	0	4	0	6	7	4	2	0	5	■ ○
28. POSM II PROPERTIES PARTNERSHIP, LLC	3	2	0	3	6	4	6	0	4	8	6	■ ○
29. EQUISTAR OLEFINS OFFTAKE LP(DISREGARD, ENTITY)	3	2	0	3	5	7	9	3	3	7	4	■ ○
30. EQUISTAR MONT BELVIEU CORP	3	0	0	0	9	8	2	9	1	1	7	■ ○
31. EQUISTAR OLEFINS OFFTAKE G.P., LLC (DISREGARDED)	3	2	0	1	1	0	4	7	6	5	4	■ ○
32. EQUISTAR OLEFINS G.P.,LLC(DISREGARDED ENTITY)	3	2	0	1	1	0	4	7	6	9	6	■ ○
33. EQUISTAR BAYPORT, LLC (DISREGARDED ENTITY)	0	0	0	0	0	0	0	0	0	0	0	■ ○
34. PO OFFTAKE, LP (DISREGARDED ENTITY)	3	2	0	3	6	6	5	5	4	4	0	■ ○
35. LYONDELL REFINING I LLC	4	5	3	4	5	3	3	9	1			■ ○
36. LYONDELL POJVG, LLC(DISREGARDED ENTITY)	1	5	1	0	3	9	8	0	4	4	5	■ ○
37. LYONDELL POJVLP, LLC	9	0	0	2	4	9	0	1	1			■ ○
38. LYONDELLBASELL METHANOL GP, INC.	1	2	2	3	4	5	2	6	2	7	0	■ ○
39. EQUISTAR CHEMICALS, LP	1	7	6	0	5	5	0	4	8	1	4	■ ○
40. OLEFINS JV, LP	1	4	1	2	0	8	5	4	4	0	2	■ ○
41. EQUISTAR CHEMICALS DE MEXICO, INC.	3	0	1	1	3	8	4	7	7	1	6	■ ○
42.												■ ○

Note: To file an extension request for a reporting entity and its affiliates, Form 05-164 (Texas Franchise Tax Extension Request) must be submitted with this affiliate list. The filing of this list by itself does not constitute a properly filed Extension Request.

Do not file this form when requesting a second extension.

**Texas Comptroller Official Use Only**

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**ATTACHMENT 4**

Equistar plans to expand its Corpus Christi plant located at 1501 McKinzie Road, Corpus Christi, Texas by debottlenecking the existing olefins plant. Seven existing cracking furnaces will be upgraded with new equipment to increase the plant's ethylene production by an incremental 810 million pounds per year. This is a 49% increase in plant capacity. The planned total cost of the debottleneck expansion is \$492,744,000. New equipment that will be installed includes, but is not limited to, the following:

Steam superheater	Residue gas rectifier	Hot water secondary coolers	Process gas aftercoolers	Demeth bottoms vaporizers
Demeth feed cooler	Subcoolers	Feed coolers	Rectifier condenser	Hydrogen cores
Demeth tower reboiler	Residue gas cooler	Effluent exchangers	Ethylene tower condenser	Refrigerant Desuperheater
Ethane vaporizers	Recycle heaters	Acetylene converter	Fuel gas coalescers	Knock out drums
Reflux drum	Hydrogen drums	Expander KO drums	Flash drums	Green oil KO drum
Suction separators	Driers	Reflux pumps	Product pumps	Circulation pumps
Hot water belt pumps	Expander/recompressor	Propylene compressor	Low NOx burners	

Existing equipment that will be replaced and/or modified to handle increased production rates includes, but is not limited to, the following:

Cracking furnace coils	Primary fractionator	Caustic scrubber	Demeth prefractionator	Ethylene tower
Aftercoolers	Caustic scrubber feed heater	Subcoolers	Suction drums	Discharge drum
Precooler separator	Surge drum	Reflux drum	Process gas dryer	Process gas compressor
Ethylene compressor				

**ATTACHMENT 4A**

Equistar Chemicals, LP is wholly owned indirectly by LyondellBasell Industries, N.V. (a Netherlands entity), a global manufacturer of petrochemicals. The Corpus Christi plant is an olefins plant that produces ethylene, propylene, and other related hydrocarbon byproducts. Equistar Chemicals, LP has other plants that produce similar products in Channelview, Texas, La Porte, Texas, Morris, Illinois, and Clinton, Iowa. Another subsidiary of LyondellBasell Industries produces similar products in Germany.

LyondellBasell has the ability to and does invest in new or existing facilities in many countries around the world including the United States.

## ATTACHMENT 5

The project is located in the following taxing jurisdictions:

- Nueces County (100%)
- Calallen ISD (100%)
- Nueces County Hospital District (100%)
- Del Mar Jr. College (100%)

**ATTACHMENT 6**

Equistar plans to expand its Corpus Christi plant located at 1501 McKinzie Road, Corpus Christi, Texas by debottlenecking the existing olefins plant. Seven existing cracking furnaces will be upgraded with new equipment to increase the plant's ethylene production by an incremental 810 million pounds per year. This is a 49% increase in plant capacity. The planned total cost of the debottleneck expansion is \$492,744,000. New equipment that will be installed includes, but is not limited to, the following:

Steam superheater	Residue gas rectifier	Hot water secondary coolers	Process gas aftercoolers	Demeth bottoms vaporizers
Demeth feed cooler	Subcoolers	Feed coolers	Rectifier condenser	Hydrogen cores
Demeth tower reboiler	Residue gas cooler	Effluent exchangers	Ethylene tower condenser	Refrigerant Desuperheater
Ethane vaporizers	Recycle heaters	Acetylene converter	Fuel gas coalescers	Knock out drums
Reflux drum	Hydrogen drums	Expander KO drums	Flash drums	Green oil KO drum
Suction separators	Driers	Reflux pumps	Product pumps	Circulation pumps
Hot water belt pumps	Expander/recompressor	Propylene compressor	Low NOx burners	

Existing equipment that will be replaced and/or modified to handle increased production rates includes, but is not limited to, the following:

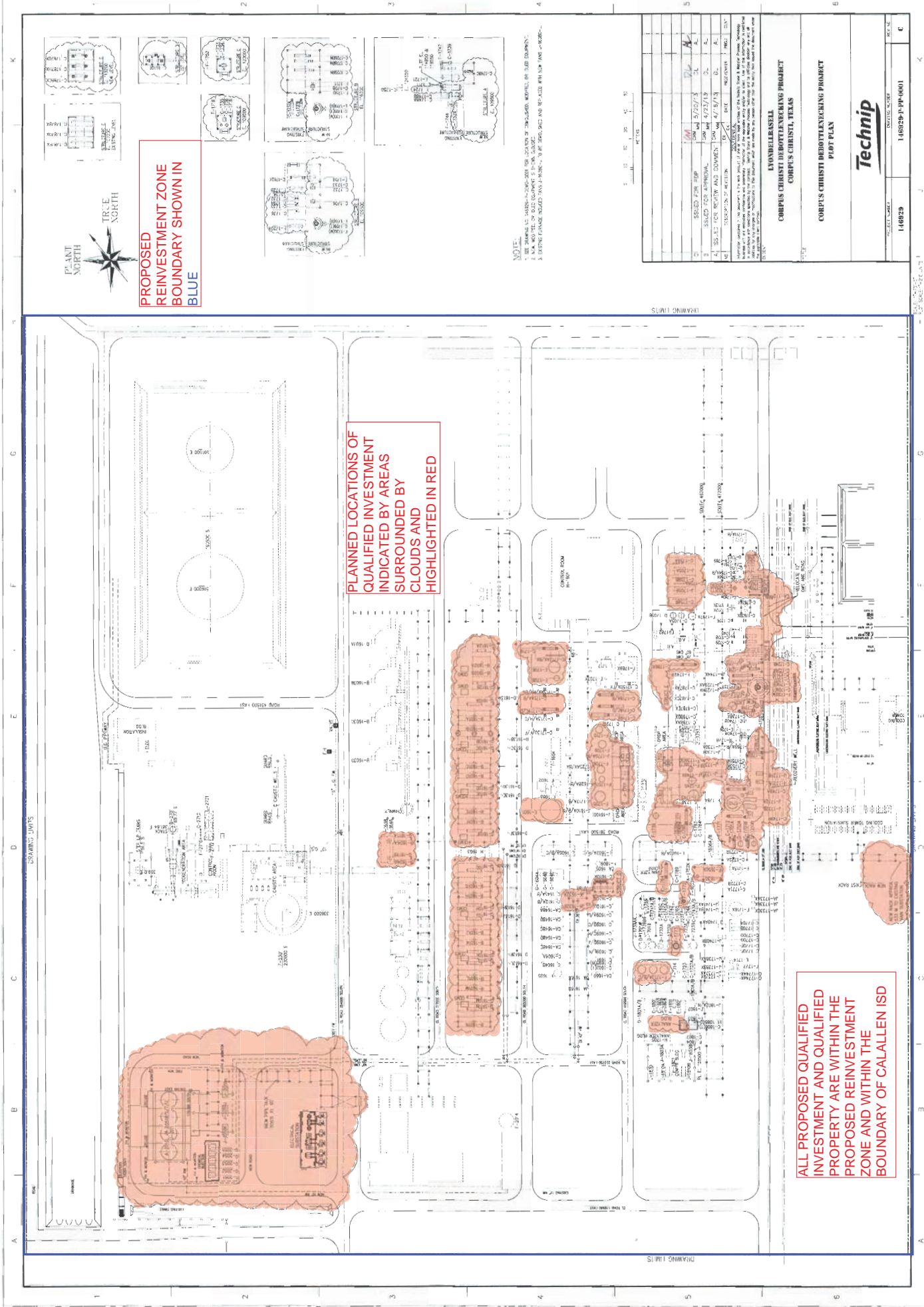
Cracking furnace coils	Primary fractionator	Caustic scrubber	Demeth prefractionator	Ethylene tower
Aftercoolers	Caustic scrubber feed heater	Subcoolers	Suction drums	Discharge drum
Precooler separator	Surge drum	Reflux drum	Process gas dryer	Process gas compressor
Ethylene compressor				

**ATTACHMENT 7**

See attached maps

**REINVESTMENT ZONE MAP**

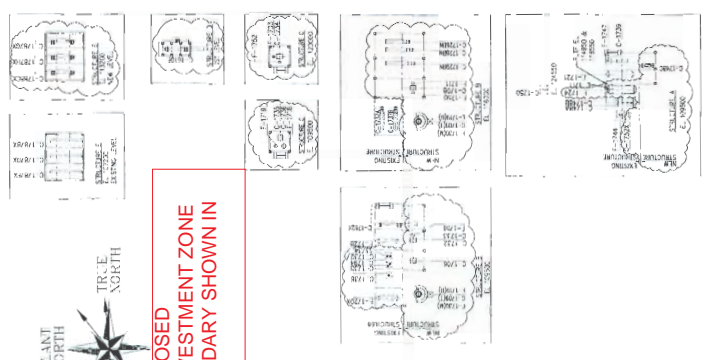
**THIS MAP WILL BE REPLACED WITH SURVEY MAP**



**PROPOSED REINVESTMENT ZONE BOUNDARY SHOWN IN BLUE**

**PLANNED LOCATIONS OF QUALIFIED INVESTMENT INDICATED BY AREAS SURROUNDED BY CLOUDS AND HIGHLIGHTED IN RED**

**ALL PROPOSED QUALIFIED INVESTMENT AND QUALIFIED PROPERTY ARE WITHIN THE PROPOSED REINVESTMENT ZONE AND WITHIN THE BOUNDARY OF CALLEEN ISD**



# Calallen ISD Map



Project Site

# Equistar Chemicals, LP Vicinity Map



**ATTACHMENT 8**

Equistar plans to expand its Corpus Christi plant located at 1501 McKinzie Road, Corpus Christi, Texas by debottlenecking the existing olefins plant. Seven existing cracking furnaces will be upgraded with new equipment to increase the plant's ethylene production by an incremental 810 million pounds per year. This is a 49% increase in plant capacity. The planned total cost of the debottleneck expansion is \$492,744,000. New equipment that will be installed includes, but is not limited to, the following:

Steam superheater	Residue gas rectifier	Hot water secondary coolers	Process gas aftercoolers	Demeth bottoms vaporizers
Demeth feed cooler	Subcoolers	Feed coolers	Rectifier condenser	Hydrogen cores
Demeth tower reboiler	Residue gas cooler	Effluent exchangers	Ethylene tower condenser	Refrigerant Desuperheater
Ethane vaporizers	Recycle heaters	Acetylene converter	Fuel gas coalescers	Knock out drums
Reflux drum	Hydrogen drums	Expander KO drums	Flash drums	Green oil KO drum
Suction separators	Driers	Reflux pumps	Product pumps	Circulation pumps
Hot water belt pumps	Expander/recompressor	Propylene compressor	Low NOx burners	

Existing equipment that will be replaced and/or modified to handle increased production rates includes, but is not limited to, the following:

Cracking furnace coils	Primary fractionator	Caustic scrubber	Demeth prefractionator	Ethylene tower
Aftercoolers	Caustic scrubber feed heater	Subcoolers	Suction drums	Discharge drum
Precooler separator	Surge drum	Reflux drum	Process gas dryer	Process gas compressor
Ethylene compressor				

**ATTACHMENT 9**

See attached maps

THIS MAP WILL BE REPLACED WITH SURVEY MAP

REINVESTMENT ZONE MAP



PROPOSED REINVESTMENT ZONE BOUNDARY SHOWN IN BLUE

PLANNED LOCATIONS OF QUALIFIED INVESTMENT INDICATED BY AREAS SURROUNDED BY CLOUDS AND HIGHLIGHTED IN RED

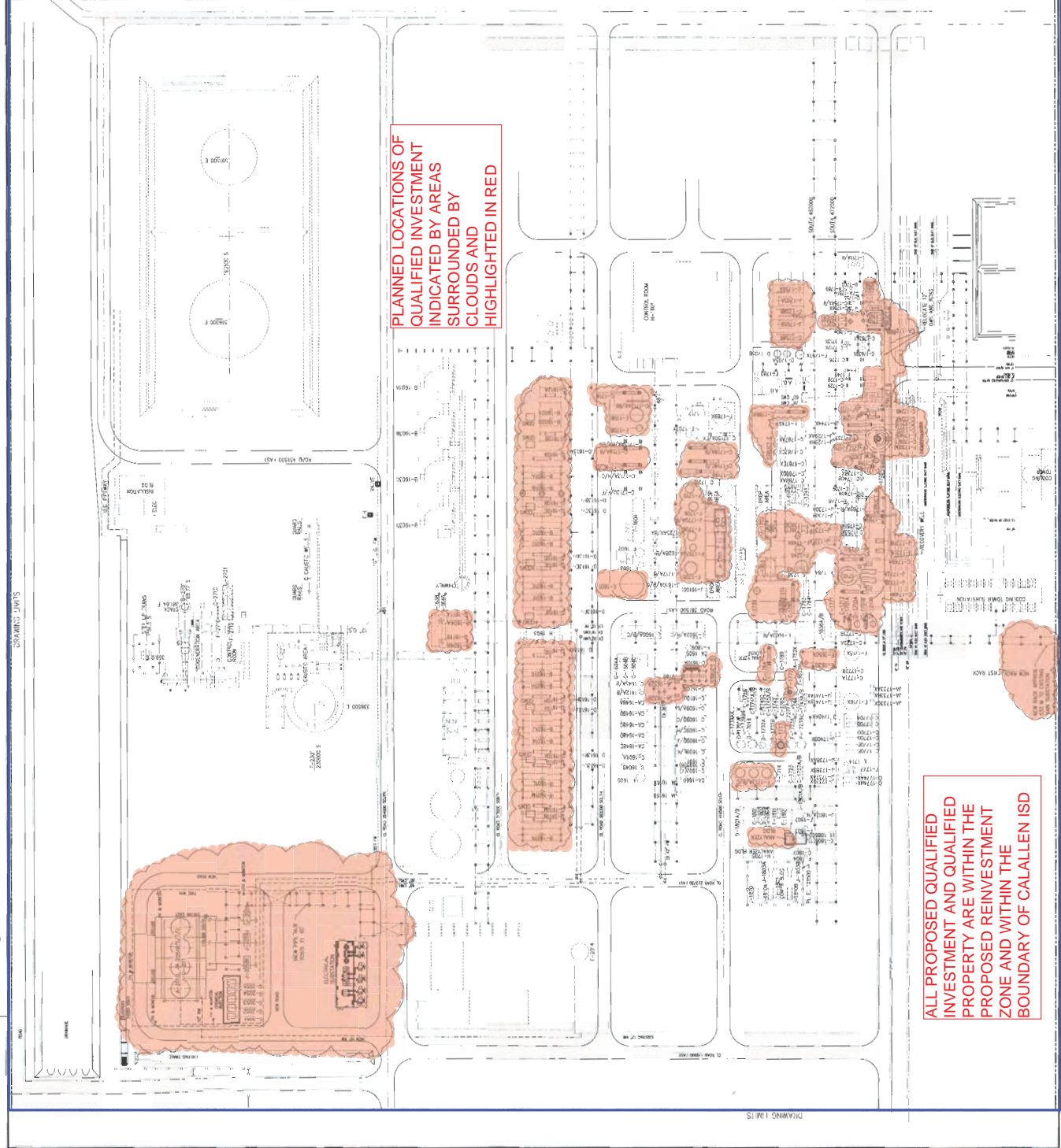
ALL PROPOSED QUALIFIED INVESTMENT AND QUALIFIED PROPERTY ARE WITHIN THE PROPOSED REINVESTMENT ZONE AND WITHIN THE BOUNDARY OF CALLEN ISD

NOTE:  
 1. THIS MAP IS INTENDED TO BE USED FOR THE PURPOSES OF IDENTIFYING AREAS QUALIFIED FOR REINVESTMENT.  
 2. THIS MAP IS NOT A SURVEY MAP AND DOES NOT CONSTITUTE A SURVEY.  
 3. THE BOUNDARY OF THE REINVESTMENT ZONE IS SHOWN IN BLUE.

NO.	DESCRIPTION	DATE	BY	CHKD.
1	ISSUED FOR PERMITS	04/18/19	JL	DL
2	ISSUED FOR REVIEW AND COMMENTS	04/18/19	JL	DL
3	ISSUED FOR REVIEW AND COMMENTS	04/18/19	JL	DL
4	ISSUED FOR REVIEW AND COMMENTS	04/18/19	JL	DL
5	ISSUED FOR REVIEW AND COMMENTS	04/18/19	JL	DL

**MANUELLETTI**  
**CORPUS CHRISTI DEBOTTLENECKING PROJECT**  
**CORPUS CHRISTI, TEXAS**  
**CORPUS CHRISTI DEBOTTLENECKING PROJECT**  
**PLOT PLAN**

PROJECT NUMBER: 148929  
 PROJECT DATE: 148929-0-PP-0001  
 SHEET: C



# Calallen ISD Map



# Equistar Chemicals, LP Vicinity Map



**ATTACHMENT 10**

The legal description of the proposed reinvestment zone will be provided upon completion of the survey.

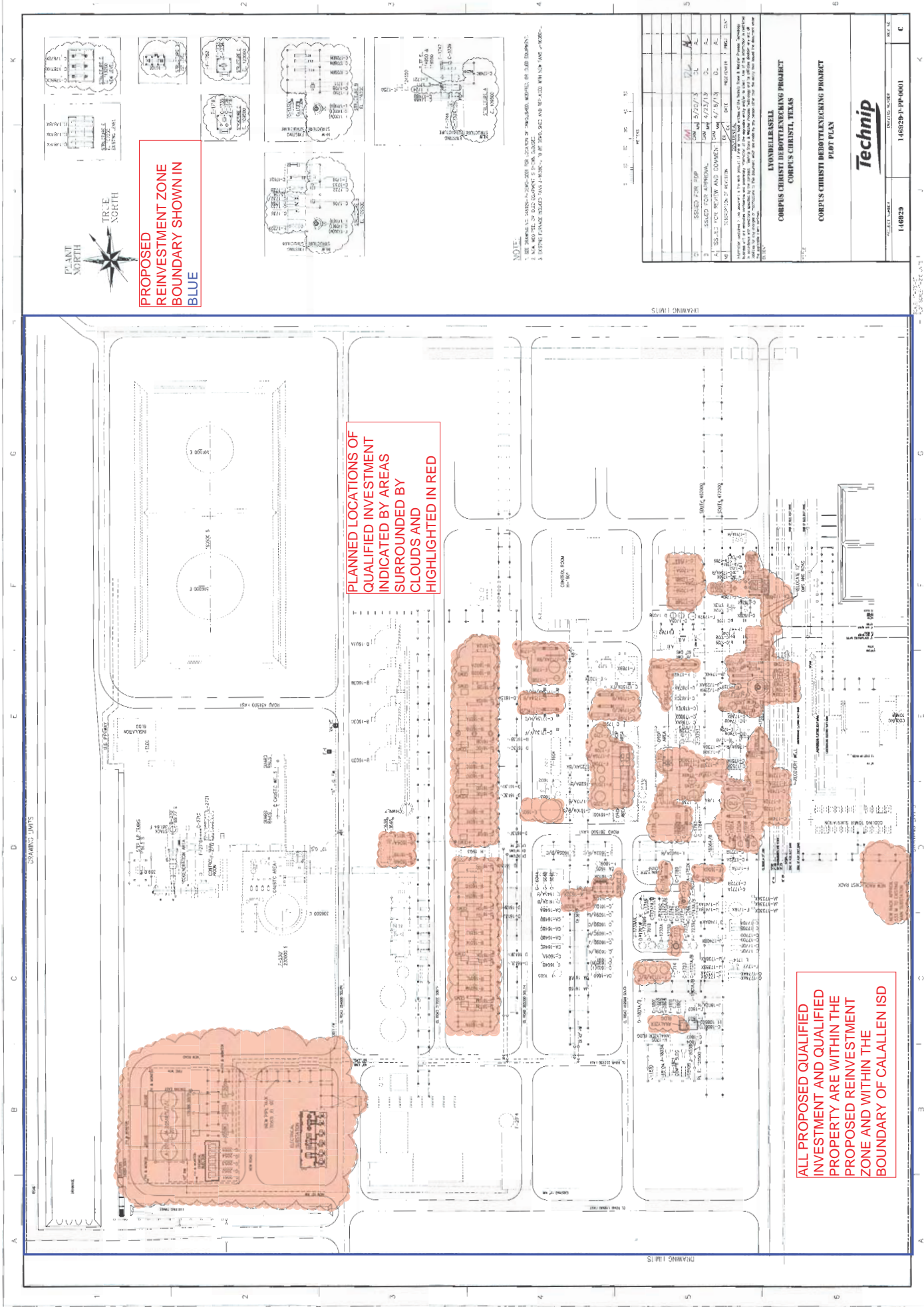
The reinvestment zone will consist of property owned by Equistar Chemicals, LP. No qualified investment or qualified property will be constructed on any land that Equistar does not own.

**ATTACHMENT 11**

Please see attached maps

**REINVESTMENT ZONE MAP**

**THIS MAP WILL BE REPLACED WITH SURVEY MAP**



**PLANNED LOCATIONS OF QUALIFIED INVESTMENT INDICATED BY AREAS SURROUNDED BY CLOUDS AND HIGHLIGHTED IN RED**

**PROPOSED REINVESTMENT ZONE BOUNDARY SHOWN IN BLUE**

**NOTE:**  
 1. ALL AREAS SHOWN ARE SUBJECT TO THE CITY OF CORPUS CHRISTI, TEXAS, ZONING ORDINANCE, AND ALL APPLICABLE ORDINANCES.  
 2. ALL AREAS SHOWN ARE SUBJECT TO THE CITY OF CORPUS CHRISTI, TEXAS, ZONING ORDINANCE, AND ALL APPLICABLE ORDINANCES.  
 3. ALL AREAS SHOWN ARE SUBJECT TO THE CITY OF CORPUS CHRISTI, TEXAS, ZONING ORDINANCE, AND ALL APPLICABLE ORDINANCES.

NO.	DESCRIPTION	DATE	BY	CHKD.
1	ISSUED FOR PERMIT	11/15/2019	JL	ML
2	ISSUED FOR PERMIT	11/15/2019	JL	ML
3	ISSUED FOR PERMIT	11/15/2019	JL	ML
4	ISSUED FOR PERMIT	11/15/2019	JL	ML
5	ISSUED FOR PERMIT	11/15/2019	JL	ML

**MANUELLETTI**  
**CORPUS CHRISTI DERMATOLOGY PROJECT**  
**CORPUS CHRISTI, TEXAS**

**CORPUS CHRISTI DERMATOLOGY PROJECT**  
**PLOT PLAN**

**Technip**  
 TECHNIP INC.  
 148929  
 148929-0-PP-0001

**ALL PROPOSED QUALIFIED INVESTMENT AND QUALIFIED PROPERTY ARE WITHIN THE PROPOSED REINVESTMENT ZONE AND WITHIN THE BOUNDARY OF CALLEN ISD**

# Calallen ISD Map



Project Site

# Equistar Chemicals, LP Vicinity Map



## ATTACHMENT 12

Equistar's has existing chemical processing units at the Corpus Christi plant within Calallen ISD. These assets consist of the following:

- Olefins unit
- Tank Farms
- Utilities
- Waste water treatment plant
- Various buildings
- Pollution Control Equipment

The improvements listed above are assessed by Nueces County Appraisal District. The Nueces County Appraisal District account numbers and the most recent property values are shown in Exhibit 12A.

**Equistar will request that Nueces County Appraisal District create new property account numbers for the property that is the subject of this application so as to be able to track the increased value attributable to the qualified property.**

**ATTACHMENT 12 A**

Nueces County Appraisal District account numbers and 2012 property values for Equistar’s plant improvement property tax accounts in Calallen ISD are shown below and in the supporting attachments.

<b>NCAD Property Account Number</b>	<b>Property Description</b>	<b>2012 Appraised Value</b>
IE-2259500-0101	Petrochemical plant	\$113,240,640
IE-2259500-0103	Butadiene plant/loading facilities	\$1,839,330
IE-2259500-0104	BD Vent minimization project	\$98,050
IE-2259500-0105	Cooling tower	\$231,500
<b>Total</b>		<b>\$115,409,520</b>

**Nueces CAD**

**Property Search Results > 9901015 EQUSTAR CHEMICALS LP for Year 2012**

**Property**

**Account**

Property ID: 9901015 Legal Description: PETR-CHEM PLANT  
 Geographic ID: IE-2259500-0101 Agent Code: ID:643569  
 Type: Personal  
 Property Use Code:  
 Property Use Description:

**Location**

Address: 78401 Mapsco:  
 Neighborhood: Map ID:  
 Neighborhood CD:

**Owner**

Name: EQUSTAR CHEMICALS LP Owner ID: 648538  
 Mailing Address: %TAX DEPARTMENT % Ownership: 100.0000000000%  
 PO BOX 3646  
 HOUSTON , TX 77253-3646  
 Exemptions:

**Values**

(+) Improvement Homesite Value: + \$0  
 (+) Improvement Non-Homesite Value: + \$0  
 (+) Land Homesite Value: + \$0  
 (+) Land Non-Homesite Value: + \$0 Ag / Timber Use Value  
 (+) Agricultural Market Valuation: + \$0 \$0  
 (+) Timber Market Valuation: + \$0 \$0  
 -----  
 (=) Market Value: = \$113,240,640  
 (-) Ag or Timber Use Value Reduction: - \$0  
 -----  
 (=) Appraised Value: = \$113,240,640  
 (-) HS Cap: - \$0  
 -----  
 (=) Assessed Value: = \$113,240,640

**Taxing Jurisdiction**

Owner: EQUSTAR CHEMICALS LP  
 % Ownership: 100.0000000000%  
 Total Value: \$113,240,640

Entity	Description	Tax Rate	Appraised Value	Taxable Value	Estimated Tax
CAD	APPRAISAL DISTRICT	0.000000	\$113,240,640	\$113,240,640	\$0.00
GNU	NUECES COUNTY	0.350999	\$113,240,640	\$113,240,640	\$397,473.51
HOSP	HOSPITAL DISTRICT	0.162428	\$113,240,640	\$113,240,640	\$183,934.51
JRC	DEL MAR JR COLL	0.258003	\$113,240,640	\$113,240,640	\$292,164.25
RFM	FARM TO MKT ROAD	0.004260	\$113,240,640	\$113,240,640	\$4,824.05
SL	CALALLEN ISD	1.358500	\$113,240,640	\$113,240,640	\$1,538,374.10
Total Tax Rate:		2.134190			

**Nueces CAD**

**Property Search Results > 9901016 EQUSTAR CHEMICALS LP for Year 2012**

**Property**

**Account**

Property ID: 9901016 Legal Description: BUTADIENE PLANT/LOADNG FAC  
 Geographic ID: IE-2259500-0103 Agent Code: ID:643569  
 Type: Personal  
 Property Use Code:  
 Property Use Description:

**Location**

Address: 78401 Mapsco:  
 Neighborhood: Map ID:  
 Neighborhood CD:

**Owner**

Name: EQUSTAR CHEMICALS LP Owner ID: 648538  
 Mailing Address: %TAX DEPARTMENT % Ownership: 100.0000000000%  
 PO BOX 3646  
 HOUSTON , TX 77253-3646  
 Exemptions:

**Values**

(+) Improvement Homesite Value: + \$0  
 (+) Improvement Non-Homesite Value: + \$0  
 (+) Land Homesite Value: + \$0  
 (+) Land Non-Homesite Value: + \$0 Ag / Timber Use Value  
 (+) Agricultural Market Valuation: + \$0 \$0  
 (+) Timber Market Valuation: + \$0 \$0  
 -----  
 (=) Market Value: = \$1,839,330  
 (-) Ag or Timber Use Value Reduction: - \$0  
 -----  
 (=) Appraised Value: = \$1,839,330  
 (-) HS Cap: - \$0  
 -----  
 (=) Assessed Value: = \$1,839,330

**Taxing Jurisdiction**

Owner: EQUSTAR CHEMICALS LP  
 % Ownership: 100.0000000000%  
 Total Value: \$1,839,330

Entity	Description	Tax Rate	Appraised Value	Taxable Value	Estimated Tax
CAD	APPRAISAL DISTRICT	0.000000	\$1,839,330	\$1,839,330	\$0.00
GNU	NUECES COUNTY	0.350999	\$1,839,330	\$1,839,330	\$6,456.03
HOSP	HOSPITAL DISTRICT	0.162428	\$1,839,330	\$1,839,330	\$2,987.59
JRC	DEL MAR JR COLL	0.258003	\$1,839,330	\$1,839,330	\$4,745.53
RFM	FARM TO MKT ROAD	0.004260	\$1,839,330	\$1,839,330	\$78.36
SF	T-M ISD	1.332200	\$1,839,330	\$1,839,330	\$24,503.55
Total Tax Rate:		2.107890			

## Nueces CAD

### Property Search Results > 9901017 EQUISTAR CHEMICALS LP for Year 2012

#### Property

##### Account

Property ID: 9901017 Legal Description: B-D VENT MINIMIZATION PROJ  
 Geographic ID: IE-2259500-0104 Agent Code: ID:643569  
 Type: Personal  
 Property Use Code:  
 Property Use Description:

##### Location

Address: 78401 Mapsco:  
 Neighborhood: Map ID:  
 Neighborhood CD:

##### Owner

Name: EQUISTAR CHEMICALS LP Owner ID: 648538  
 Mailing Address: %TAX DEPARTMENT % Ownership: 100.0000000000%  
 PO BOX 3646  
 HOUSTON , TX 77253-3646  
 Exemptions:

#### Values

(+) Improvement Homesite Value:	+	\$0	
(+) Improvement Non-Homesite Value:	+	\$0	
(+) Land Homesite Value:	+	\$0	
(+) Land Non-Homesite Value:	+	\$0	Ag / Timber Use Value
(+) Agricultural Market Valuation:	+	\$0	\$0
(+) Timber Market Valuation:	+	\$0	\$0
-----			
(=) Market Value:	=	\$98,050	
(-) Ag or Timber Use Value Reduction:	-	\$0	
-----			
(=) Appraised Value:	=	\$98,050	
(-) HS Cap:	-	\$0	
-----			
(=) Assessed Value:	=	\$98,050	

#### Taxing Jurisdiction

Owner: EQUISTAR CHEMICALS LP  
 % Ownership: 100.0000000000%  
 Total Value: \$98,050

Entity	Description	Tax Rate	Appraised Value	Taxable Value	Estimated Tax
CAD	APPRAISAL DISTRICT	0.000000	\$98,050	\$98,050	\$0.00
GNU	NUECES COUNTY	0.350999	\$98,050	\$98,050	\$344.16
HOSP	HOSPITAL DISTRICT	0.162428	\$98,050	\$98,050	\$159.26
JRC	DEL MAR JR COLL	0.258003	\$98,050	\$98,050	\$252.97
RFM	FARM TO MKT ROAD	0.004260	\$98,050	\$98,050	\$4.18
SF	T-M ISD	1.332200	\$98,050	\$98,050	\$1,306.22
Total Tax Rate:		2.107890			

## Nueces CAD

### Property Search Results > 9901018 EQUISTAR CHEMICALS LP for Year 2012

#### Property

##### Account

Property ID: 9901018 Legal Description: COOLING TOWER  
 Geographic ID: IE-2259500-0105 Agent Code: ID:643569  
 Type: Personal  
 Property Use Code:  
 Property Use Description:

##### Location

Address: 78401 Mapsco:  
 Neighborhood: Map ID:  
 Neighborhood CD:

##### Owner

Name: EQUISTAR CHEMICALS LP Owner ID: 648538  
 Mailing Address: %TAX DEPARTMENT % Ownership: 100.0000000000%  
 PO BOX 3646  
 HOUSTON , TX 77253-3646  
 Exemptions:

#### Values

(+) Improvement Homesite Value:	+	\$0	
(+) Improvement Non-Homesite Value:	+	\$0	
(+) Land Homesite Value:	+	\$0	
(+) Land Non-Homesite Value:	+	\$0	Ag / Timber Use Value
(+) Agricultural Market Valuation:	+	\$0	\$0
(+) Timber Market Valuation:	+	\$0	\$0
-----			
(=) Market Value:	=	\$231,500	
(-) Ag or Timber Use Value Reduction:	-	\$0	
-----			
(=) Appraised Value:	=	\$231,500	
(-) HS Cap:	-	\$0	
-----			
(=) Assessed Value:	=	\$231,500	

#### Taxing Jurisdiction

Owner: EQUISTAR CHEMICALS LP  
 % Ownership: 100.0000000000%  
 Total Value: \$231,500

Entity	Description	Tax Rate	Appraised Value	Taxable Value	Estimated Tax
CAD	APPRAISAL DISTRICT	0.000000	\$231,500	\$231,500	\$0.00
GNU	NUECES COUNTY	0.350999	\$231,500	\$231,500	\$812.56
HOSP	HOSPITAL DISTRICT	0.162428	\$231,500	\$231,500	\$376.02
JRC	DEL MAR JR COLL	0.258003	\$231,500	\$231,500	\$597.28
RFM	FARM TO MKT ROAD	0.004260	\$231,500	\$231,500	\$9.86
SL	CALALLEN ISD	1.358500	\$231,500	\$231,500	\$3,144.93
Total Tax Rate:		2.134190			

**ATTACHMENT 13**

Please see the attached letter requesting a waiver of the jobs requirement.

# CUMMINGS WESTLAKE LLC

12837 Louetta Road, Suite 201 Cypress, Texas 77429-5611 713-266-4456 713-266-2333 (Fax)

June 6, 2013

Dr. Arturo Almendarez  
Superintendent  
Calallen Independent School District  
4205 Wildcat Drive  
Corpus Christi, TX 78410

**Re: Chapter 313 Job Waiver Request**

Dear Dr. Almendarez,

Equistar Chemicals, LP requests that the Calallen Independent School District's Board of Trustees waive the job requirement provision as allowed by Section 313.025(f-1) of the Tax Code. This waiver would be based on the school district's board findings that the jobs creation requirement exceeds the industry standard for the number of employees reasonably necessary for the operation of the facility of the property owner that is described in the application.

Equistar Chemicals, LP requests that the Board of Trustees make such a finding and waive the job creation requirement for ten permanent jobs. Equistar operates olefins plants similar to the Corpus Christi plant at two other locations in Texas and one location each in Iowa and Illinois. As a leading global producer in the production of ethylene, propylene, and downstream derivative products Equistar has determined that the expansion of the Corpus Christi plant will require the creation of three new jobs.

The debottleneck project for the Corpus Christi plant involves expanding the plant capacity by 49% or 810 million pounds of ethylene capacity per year. The seven existing cracking furnaces will be upgraded with new equipment, including furnace coils, to provide additional ethylene production capacity. Other equipment will be replaced or modified to handle increased production rates. All of the new equipment will be operated from Equistar's existing control room.

Sincerely,



D. Dale Cummings

**ATTACHMENT 14**

The calculation of the three possible wage requirements with TWC documentation is attached. Equistar has chosen to use \$65,000 as the wage rate for permanent jobs. This amount exceeds 110% of the current regional wage rate of \$51,138 ( $\$46,489 \times 110\% = \$51,138$ ).

**EQUISTAR CHEMICALS, LP  
ATTACHMENT 14**

**CALLEN ISD - NUECES COUNTY  
CHAPTER 313 WAGE CALCULATION - ALL JOBS - ALL INDUSTRIES**

QUARTER	YEAR	AVG WEEKLY WAGES*	ANNUALIZED
FIRST	2012	\$ 820	\$ 42,640
SECOND	2012	\$ 804	\$ 41,808
THIRD	2012	\$ 799	\$ 41,548
FOURTH	2012	\$ 885	\$ 46,020
AVERAGE		\$ 827	\$ 43,004
		X 110%	110%
		\$ 910	\$ 47,304

**CALLEN ISD - NUECES COUNTY  
CHAPTER 313 WAGE CALCULATION - MANUFACTURING JOBS**

QUARTER	YEAR	AVG WEEKLY WAGES*	ANNUALIZED
FIRST	2012	\$ 1,382	\$ 71,864
SECOND	2012	\$ 1,277	\$ 66,404
THIRD	2012	\$ 1,209	\$ 62,868
FOURTH	2012	\$ 1,431	\$ 74,412
AVERAGE		\$ 1,325	\$ 68,887
		X 110%	110%
		\$ 1,457	\$ 75,776

**CHAPTER 313 WAGE CALCULATION - REGIONAL WAGE RATE**










REGION	YEAR	AVG WEEKLY WAGES*	ANNUALIZED
COASTAL BEND	2011	\$ 894	\$ 46,489
		X 110%	110%
		\$ 983	\$ 51,138

\* SEE ATTACHED TWC DOCUMENTATION

## Quarterly Employment and Wages (QCEW)

[Back](#)










Page 1 of 1 (40 results/page)

 Year	 Period	 Area	 Ownership	 Division	 Level	 Ind Code	 Industry	 Avg Weekly Wages
2012	1st Qtr	Nueces County	Total All	00	0	10	Total, All Industries	\$820
2012	2nd Qtr	Nueces County	Total All	00	0	10	Total, All Industries	\$804
2012	3rd Qtr	Nueces County	Total All	00	0	10	Total, All Industries	\$799
2012	4th Qtr	Nueces County	Total All	00	0	10	Total, All Industries	\$885

## Quarterly Employment and Wages (QCEW)

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Page 1 of 1 (40 results/page)

 Year	 Period	 Area	 Ownership	 Division	 Level	 Ind Code	 Industry	 Avg Weekly Wages
2012	1st Qtr	Nueces County	Total All	31	2	31-33	Manufacturing	\$1,382
2012	2nd Qtr	Nueces County	Total All	31	2	31-33	Manufacturing	\$1,277
2012	3rd Qtr	Nueces County	Total All	31	2	31-33	Manufacturing	\$1,209
2012	4th Qtr	Nueces County	Total All	31	2	31-33	Manufacturing	\$1,431

**2011 Manufacturing Wages by Council of Government Region  
Wages for All Occupations**

COG	Wages	
	Hourly	Annual
<b>Texas</b>	<b>\$22.89</b>	<b>\$47,610</b>
<a href="#">1. Panhandle Regional Planning Commission</a>	\$19.32	\$40,196
<a href="#">2. South Plains Association of Governments</a>	\$16.45	\$34,210
<a href="#">3. NORTEX Regional Planning Commission</a>	\$18.14	\$37,733
<a href="#">4. North Central Texas Council of Governments</a>	\$24.03	\$49,986
<a href="#">5. Ark-Tex Council of Governments</a>	\$16.52	\$34,366
<a href="#">6. East Texas Council of Governments</a>	\$18.27	\$37,995
<a href="#">7. West Central Texas Council of Governments</a>	\$17.76	\$36,949
<a href="#">8. Rio Grande Council of Governments</a>	\$15.69	\$32,635
<a href="#">9. Permian Basin Regional Planning Commission</a>	\$21.32	\$44,349
<a href="#">10. Concho Valley Council of Governments</a>	\$15.92	\$33,123
<a href="#">11. Heart of Texas Council of Governments</a>	\$18.82	\$39,150
<a href="#">12. Capital Area Council of Governments</a>	\$26.46	\$55,047
<a href="#">13. Brazos Valley Council of Governments</a>	\$15.71	\$33,718
<a href="#">14. Deep East Texas Council of Governments</a>	\$15.48	\$32,207
<a href="#">15. South East Texas Regional Planning Commission</a>	\$28.23	\$58,724
<a href="#">16. Houston-Galveston Area Council</a>	\$25.82	\$53,711
<a href="#">17. Golden Crescent Regional Planning Commission</a>	\$20.38	\$42,391
<a href="#">18. Alamo Area Council of Governments</a>	\$18.00	\$37,439
<a href="#">19. South Texas Development Council</a>	\$13.85	\$28,806
<a href="#">20. Coastal Bend Council of Governments</a>	\$22.35	\$46,489
<a href="#">21. Lower Rio Grande Valley Development Council</a>	\$15.08	\$31,365
<a href="#">22. Texoma Council of Governments</a>	\$20.76	\$43,190
<a href="#">23. Central Texas Council of Governments</a>	\$16.17	\$33,642
<a href="#">24. Middle Rio Grande Development Council</a>	\$13.65	\$28,382

$110\% \times \$46,489 =$   
 $\$51,138$

Source: Texas Occupational Employment and Wages

Data published: July 2012

Data published annually, next update will be summer 2013

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

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

Data intended for TAC 313 purposes only.

## **ATTACHMENT 15**

Equistar provides its employees with benefits including but not limited to the following:

- Medical Coverage (company pays 80% of employee health insurance premiums)
- Dental Plan
- Group Life Insurance
- Paid Holidays
- Paid Vacation
- 401(k) Retirement Savings Plan

**ATTACHMENT 16**

The economic impact study will be performed by the Comptroller at a future date.

**ATTACHMENT 17**

Please see attached Schedule A

**Schedule A (Rev. January 2013): Investment**

**Applicant Name** EQUICSTAR CHEMICALS, LP  
**ISD Name** CALLEEN ISD

**Form 50-296**

**PROPERTY INVESTMENT AMOUNTS**

(Estimated investment in each year. Do not put cumulative totals.)

	Year	School Year (YYYY-YYYY)	Tax Year (Fill in actual tax year below) YYYY	Column A:	Column B:	Column C:	Column D:	Column E:	
				Tangible Personal Property The amount of new investment (original cost) placed in service during this year	Building or permanent nonremovable component of building (annual amount only)	Sum of A and B Qualifying investment (during the qualifying time period)	Other investment that is not qualified investment but investment affecting economic impact and total value	Total Investment (A+B+D)	
The year preceding the first complete tax year of the qualifying time period (assuming no deferrals)	Investment made before filing complete application with district (neither qualified property nor eligible to become qualified investment)	2013-2014	2013	0	0	0	0	0	
	Investment made after filing complete application with district, but before final board approval of application (eligible to become qualified property)			-	-	-	0	-	
	Investment made after final board approval of application and before Jan 1 of first complete tax year of qualifying time period (qualified investment and eligible to become qualified property)			\$ 30,319,000	\$ -	\$ 30,319,000	0	\$ 30,319,000	
Complete tax years of qualifying time period	1	2014-2015	2014	\$ 140,080,000	\$ -	\$ 140,080,000	0	\$ 140,080,000	
	2	2015-2016	2015	\$ 320,595,000	\$ -	\$ 320,595,000	0	\$ 320,595,000	
Tax Credit Period (with 50% cap on credit)	Value Limitation Period	3	2016-2017	2016	\$ 1,750,000	\$ -	\$ 1,750,000	0	\$ 1,750,000
		4	2017-2018	2017	0	0	0	0	-
		5	2018-2019	2018	0	0	0	0	0
		6	2019-2020	2019	0	0	0	0	0
		7	2020-2021	2020	0	0	0	0	0
		8	2021-2022	2021	0	0	0	0	0
		9	2022-2023	2022	0	0	0	0	0
		10	2023-2004	2023	0	0	0	0	0
Credit Settle-Up Period	Continue to Maintain Viable Presence	11	2024-2025	2024	0	0	0	0	0
		12	2025-2026	2025	0	0	0	0	0
		13	2026-2027	2026	0	0	0	0	0
Post- Settle-Up Period		14	2027-2028	2027	0	0	0	0	
Post- Settle-Up Period		15	2028-2029	2028	0	0	0	0	

Qualifying Time Period usually begins with the final board approval of the application and extends generally for the following two complete tax years

Column A: This represents the total dollar amount of planned investment in tangible personal property the applicant considers qualified investment - as defined in Tax Code §313.021(1)(A)-(D). For the purposes of investment, please list amount invested each year, not cumulative totals

[For the years outside the qualifying time period, this number should simply represent the planned investment in tangible personal property].

Include estimates of investment for "replacement" property-property that is part of original agreement but scheduled for probable replacement during limitation period

Column B: The total dollar amount of planned investment each year in buildings or nonremovable component of buildings that the applicant considers qualified investment under Tax Code §313.021(1)(E)

For the years outside the qualifying time period, this number should simply represent the planned investment in new buildings or nonremovable components of buildings.

Column D: Dollar value of other investment that may not be qualified investment but that may affect economic impact and total value-for planning, construction and operation of the facility.

The most significant example for many projects would be land. Other examples may be items such as professional services, etc.

Note: Land can be listed as part of investment during the "pre-year 1" time period. It cannot be part of qualifying investment.

Notes: For advanced clean energy projects, nuclear projects, projects with deferred qualifying time periods, and projects with lengthy application review periods. Insert additional rows as needed.

This schedule must be submitted with the original application and any application for tax credit. When using this schedule for any purpose other than the original application,

replace original estimates with actual appraisal district data for past years and update estimates for current and future years. If original estimates have not changed, enter

those amounts for future years.

*Stephen R. Ward*  
 \_\_\_\_\_  
 SIGNATURE OF AUTHORIZED COMPANY REPRESENTATIVE

*JUNE 10, 2013*  
 \_\_\_\_\_  
 DATE

**ATTACHMENT 18**

Please see attached Schedule B

**Schedule B (Rev. January 2013): Estimated Market And Taxable Value**  
**EQUISTAR CHEMICALS, LP**

Applicant Name  
 ISD Name

CALALLEN ISD

Form 50-296

		Year	School Year (YYYY-YYYY)	Tax Year (Fill in actual tax year) YYYY	Qualified Property			Reductions from Market Value	Estimated Taxable Value	
					Estimated Market Value of Land	Estimated Total Market Value of new buildings or other new improvements	Estimated Total Market Value of tangible personal property in the new building or "in or on the new improvement"	Exempted Value	Final taxable value for I&S - after all reductions	Final taxable value for M&O--after all reductions
		pre- year 1	2013-2014	2013	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Complete tax years of qualifying time period	1	2014-2015	2014	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		2	2015-2016	2015	\$ -	\$ -	\$ 85,200,000	\$ 4,260,000	\$ 80,940,000	\$ 80,940,000
Tax Credit Period (with 50% cap on credit)	Value Limitation Period	3	2016-2017	2016	\$ -	\$ -	\$ 491,000,000	\$ 24,550,000	\$ 466,450,000	\$ 30,000,000
		4	2017-2018	2017	\$ -	\$ -	\$ 492,744,000	\$ 24,637,000	\$ 468,107,000	\$ 30,000,000
		5	2018-2019	2018	\$ -	\$ -	\$ 473,034,000	\$ 23,652,000	\$ 449,382,000	\$ 30,000,000
		6	2019-2020	2019	\$ -	\$ -	\$ 454,113,000	\$ 22,706,000	\$ 431,407,000	\$ 30,000,000
		7	2020-2021	2020	\$ -	\$ -	\$ 435,948,000	\$ 21,797,000	\$ 414,151,000	\$ 30,000,000
		8	2021-2022	2021	\$ -	\$ -	\$ 418,510,000	\$ 20,926,000	\$ 397,584,000	\$ 30,000,000
		9	2022-2023	2022	\$ -	\$ -	\$ 401,770,000	\$ 20,089,000	\$ 381,681,000	\$ 30,000,000
		10	2023-2004	2023	\$ -	\$ -	\$ 385,699,000	\$ 19,285,000	\$ 366,414,000	\$ 30,000,000
Credit Settle-Up Period	Continue to Maintain Viable Presence	11	2024-2025	2024	\$ -	\$ -	\$ 370,271,000	\$ 18,514,000	\$ 351,757,000	\$ 351,757,000
		12	2025-2026	2025	\$ -	\$ -	\$ 355,460,000	\$ 17,773,000	\$ 337,687,000	\$ 337,687,000
		13	2026-2027	2026	\$ -	\$ -	\$ 341,242,000	\$ 17,062,000	\$ 324,180,000	\$ 324,180,000
Post- Settle-Up Period		14	2027-2028	2027	\$ -	\$ -	\$ 327,592,000	\$ 16,380,000	\$ 311,212,000	\$ 311,212,000
Post- Settle-Up Period		15	2028-2029	2028	\$ -	\$ -	\$ 314,488,000	\$ 15,724,000	\$ 298,764,000	\$ 298,764,000

Notes: Market value in future years is good faith estimate of future taxable value for the purposes of property taxation.  
 This schedule must be submitted with the original application and any application for tax credit. When using this schedule for any purpose other than the original application, replace original estimates with actual appraisal district data for past years and update estimates for current and future years. If original estimates have not changed, enter those amounts for future years.

*Stephen R. Ward*

SIGNATURE OF AUTHORIZED COMPANY REPRESENTATIVE

*June 10, 2013*

DATE

**ATTACHMENT 19**

Please see attached Schedule C

**Schedule C- Application: Employment Information**

**Applicant Name** EQUICSTAR CHEMICALS, LP  
**ISD Name** CALALLEN ISD

Form 50-296

		Year	School Year (YYYY-YYYY)	Tax Year (Fill in actual tax year) YYYY	Construction		New Jobs		Qualifying Jobs	
					Column A: Number of Construction FTE's or man- hours (specify)	Column B: Average annual wage rates for construction workers	Column C: Number of new jobs applicant commits to create (cumulative)	Column D: Average annual wage rate for all new jobs.	Column E: Number of qualifying jobs applicant commits to create meeting all criteria of Sec. 313.021(3) (cumulative)	Column F: Average annual wage of qualifying jobs
		pre- year 1	2013-2014	2013	0 FTEs	\$0	0	\$0	0	\$0
	Complete tax years of qualifying time period	1	2014-2015	2014	200 FTEs	\$100,000	0	\$0	0	\$0
		2	2015-2016	2015	335 FTEs	\$100,000	3	\$65,000	3	\$65,000
Tax Credit Period (with 50% cap on credit)	Value Limitation Period	3	2016-2017	2016			3	\$65,000	3	\$65,000
		4	2017-2018	2017			3	\$65,000	3	\$65,000
		5	2018-2019	2018			3	\$65,000	3	\$65,000
		6	2019-2020	2019			3	\$65,000	3	\$65,000
		7	2020-2021	2020			3	\$65,000	3	\$65,000
		8	2021-2022	2021			3	\$65,000	3	\$65,000
		9	2022-2023	2022			3	\$65,000	3	\$65,000
		10	2023-2004	2023			3	\$65,000	3	\$65,000
Credit Settle-Up Period	Continue to Maintain Viable Presence	11	2024-2025	2024			3	\$65,000	3	\$65,000
		12	2025-2026	2025			3	\$65,000	3	\$65,000
		13	2026-2027	2026			3	\$65,000	3	\$65,000
Post- Settle-Up Period		14	2027-2028	2027			3	\$65,000	3	\$65,000
Post- Settle-Up Period		15	2028-2029	2028			3	\$65,000	3	\$65,000

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

This schedule must be submitted with the original application and any application for tax credit. When using this schedule for any purpose other than the original application, replace original estimates with actual appraisal district data for past years and update estimates for current and future years. If original estimates have not changed, enter those amounts for future years.

  
 \_\_\_\_\_  
 SIGNATURE OF AUTHORIZED COMPANY REPRESENTATIVE

June 10, 2013  
 \_\_\_\_\_  
 DATE

**ATTACHMENT 20**

Please see attached Schedule D

**Schedule D: (Rev. January 2013): Other Tax Information**

**Applicant Name**

EQUISTAR CHEMICALS, LP

**ISD Name**

CALLEN ISD

**Form 50-296**

					Sales Tax Information		Franchise Tax	Other Property Tax Abatements Sought			
					Sales Taxable Expenditures		Franchise Tax	County	City	Hospital	Other
		Year	School Year (YYYY-YYYY)	Tax/Calendar Year YYYY	Column F: Estimate of total annual expenditures* subject to state sales tax	Column G: Estimate of total annual expenditures* made in Texas NOT subject to sales tax	Column H: Estimate of Franchise tax due from (or attributable to) the applicant	Fill in percentage exemption requested or granted in each year of the Agreement	Fill in percentage exemption requested or granted in each year of the Agreement	Fill in percentage exemption requested or granted in each year of the Agreement	Fill in percentage exemption requested or granted in each year of the Agreement
The year preceding the first complete tax year of the qualifying time period (assuming no deferrals)			2013-2014	2013	2,652,000	27,667,000	0	-	-	-	-
	Complete tax years of qualifying time period	1	2014-2015	2014	\$ 12,254,000	127,826,000	0	n/a	n/a	n/a	n/a
		2	2015-2016	2015	\$ 28,044,000	292,551,000	35,000	n/a	n/a	n/a	n/a
		3	2016-2017	2016	\$ 153,000	1,597,000	900,000	n/a	n/a	n/a	n/a
Tax Credit Period (with 50% cap on credit)	Value Limitation Period	4	2017-2018	2017	\$ -	\$ -	465,000	n/a	n/a	n/a	n/a
		5	2018-2019	2018	\$ -	\$ -	575,000	n/a	n/a	n/a	n/a
		6	2019-2020	2019	\$ -	\$ -	500,000	n/a	n/a	n/a	n/a
		7	2020-2021	2020	\$ -	\$ -	435,000	n/a	n/a	n/a	n/a
		8	2021-2022	2021	\$ -	\$ -	395,000	n/a	n/a	n/a	n/a
		9	2022-2023	2022	\$ -	\$ -	560,000	n/a	n/a	n/a	n/a
		10	2023-2004	2023	\$ -	\$ -	510,000	n/a	n/a	n/a	n/a
Credit Settle-Up Period	Continue to Maintain Viable Presence	11	2024-2025	2024	\$ -	\$ -	550,000	n/a	n/a	n/a	n/a
		12	2025-2026	2025	\$ -	\$ -	585,000	n/a	n/a	n/a	n/a
		13	2026-2027	2026	\$ -	\$ -	630,000	n/a	n/a	n/a	n/a
Post- Settle-Up Period		14	2027-2028	2027	\$ -	\$ -	560,000	n/a	n/a	n/a	n/a
Post- Settle-Up Period		15	2028-2029	2028	\$ -	\$ -	710,000	n/a	n/a	n/a	n/a

\*For planning, construction and operation of the facility.

*Stephen R. Ward*  
SIGNATURE OF AUTHORIZED COMPANY REPRESENTATIVE

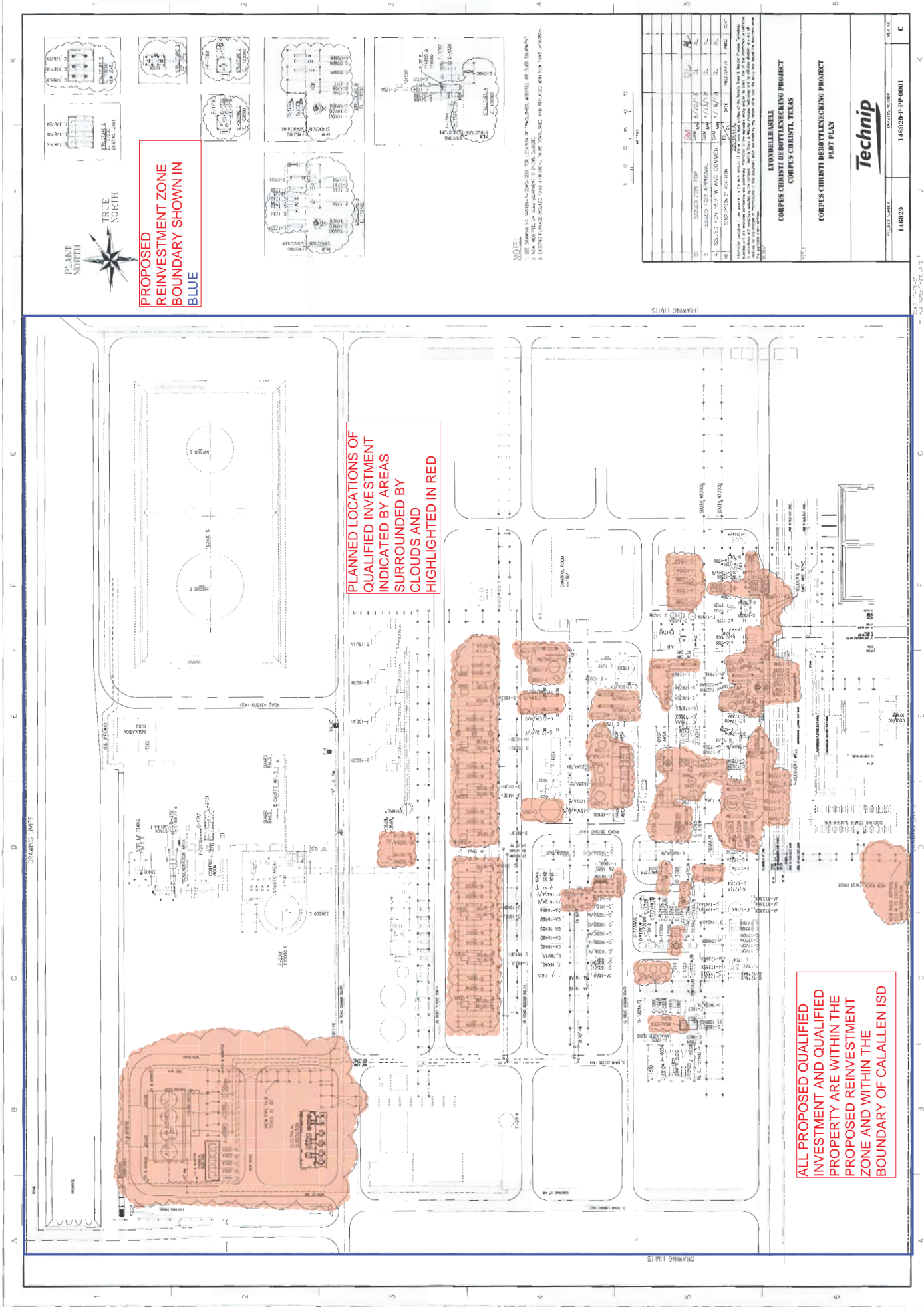
*June 10, 2013*  
DATE

**ATTACHMENT 21**

A map of the proposed reinvestment zone is attached as is a vicinity map. The reinvestment zone will be established by the Board of Trustees of Calallen ISD at a later date.

**REINVESTMENT ZONE MAP**

**THIS MAP WILL BE REPLACED WITH SURVEY MAP**



**PLANNED LOCATIONS OF QUALIFIED INVESTMENT INDICATED BY AREAS SURROUNDED BY CLOUDS AND HIGHLIGHTED IN RED**

**PROPOSED REINVESTMENT ZONE BOUNDARY SHOWN IN BLUE**



**NOTE:**  
 1. THIS MAP IS INTENDED TO BE USED FOR THE PURPOSES OF QUALIFICATION, NOT FOR CONSTRUCTION.  
 2. THIS MAP IS NOT A SURVEY MAP AND DOES NOT REPRESENT THE EXACT BOUNDARIES OF THE PROPERTY.  
 3. THE BOUNDARIES SHOWN ON THIS MAP ARE BASED ON THE INFORMATION PROVIDED BY THE CLIENT.

NO.	DESCRIPTION	DATE	BY	CHKD.
1	ISSUED FOR PERMITS	10/27/19	JL	ML
2	ISSUED FOR REVIEW AND COMMENTS	11/15/19	JL	ML
3	ISSUED FOR REVIEW AND COMMENTS	11/29/19	JL	ML
4	ISSUED FOR REVIEW AND COMMENTS	12/19/19	JL	ML
5	ISSUED FOR REVIEW AND COMMENTS	1/15/20	JL	ML

**MANUELLETTI**  
**CORPUS CHRISTI DERMATOLOGY PROJECT**  
**CORPUS CHRISTI, TEXAS**

**Plot Plan**

**Technip**

PROJECT NUMBER: 148929  
 DATE: 11/27/19

**ALL PROPOSED QUALIFIED INVESTMENT AND QUALIFIED PROPERTY ARE WITHIN THE PROPOSED REINVESTMENT ZONE AND WITHIN THE BOUNDARY OF CALLEN ISD**

# Calallen ISD Map



Project Site

# Equistar Chemicals, LP Vicinity Map



**ATTACHMENT 22**

The resolution of the Board of Trustees of Calallen ISD establishing the reinvestment zone will be provided at a later date.

**ATTACHMENT 23**

The legal description of the proposed reinvestment zone will be provided upon completion of the survey.

**ATTACHMENT 24**

Not applicable. No guidelines and criteria are required for Calallen ISD to create the reinvestment zone.

**TABLE 1. Estimated Financial impact of the Equistar Chemicals, LP Project Property Value Limitation Request Submitted to Calallen ISD at \$1.17 M&O Rate**

Year of Agreement	School Year	Project Value	Estimated Taxable Value	Value Savings	Assumed M&O Tax Rate	Taxes Before Value Limit	Taxes after Value Limit	Tax Savings @ Projected M&O Rate	Tax Credits for First Two Years Above Limit	Tax Benefit to Company Before Revenue Protection	School District Revenue Losses	Estimated Net Tax Benefits	School District Tax Benefit Lesser of \$100 per ADA or 40%	Company Tax Benefit
Pre-Year 1	2013-14	\$0	\$0	\$0	\$1.170	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
1	2014-15	\$0	\$0	\$0	\$1.170	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2	2015-16	\$80,940,000	\$80,940,000	\$0	\$1.170	\$946,998	\$946,998	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3	2016-17	\$466,450,000	\$20,000,000	\$446,450,000	\$1.170	\$5,457,465	\$234,000	\$5,223,465	\$0	\$5,223,465	-\$5,728,540	-\$505,075	\$0	-\$505,075
4	2017-18	\$468,107,000	\$20,000,000	\$448,107,000	\$1.170	\$5,476,852	\$234,000	\$5,242,852	\$101,857	\$5,344,709	-\$21,873	\$5,322,836	\$1,870,538	\$3,452,298
5	2018-19	\$449,382,000	\$20,000,000	\$429,382,000	\$1.170	\$5,257,769	\$234,000	\$5,023,769	\$101,857	\$5,125,626	\$0	\$5,125,626	\$374,108	\$4,751,519
6	2019-20	\$431,407,000	\$20,000,000	\$411,407,000	\$1.170	\$5,047,462	\$234,000	\$4,813,462	\$101,857	\$4,915,319	\$0	\$4,915,319	\$374,108	\$4,541,211
7	2020-21	\$414,151,000	\$20,000,000	\$394,151,000	\$1.170	\$4,845,567	\$234,000	\$4,611,567	\$101,857	\$4,713,424	\$0	\$4,713,424	\$374,108	\$4,339,316
8	2021-22	\$397,584,000	\$20,000,000	\$377,584,000	\$1.170	\$4,651,733	\$234,000	\$4,417,733	\$101,857	\$4,519,590	\$0	\$4,519,590	\$374,108	\$4,145,482
9	2022-23	\$381,681,000	\$20,000,000	\$361,681,000	\$1.170	\$4,465,668	\$234,000	\$4,231,668	\$101,857	\$4,333,525	\$0	\$4,333,525	\$374,108	\$3,959,417
10	2023-24	\$366,414,000	\$20,000,000	\$346,414,000	\$1.170	\$4,287,044	\$234,000	\$4,053,044	\$101,857	\$4,154,901	\$0	\$4,154,901	\$374,108	\$3,780,793
11	2024-25	\$351,757,000	\$351,757,000	\$0	\$1.170	\$4,115,557	\$4,115,557	\$0	\$0	\$0	\$0	\$0	\$374,108	-\$374,108
12	2025-26	\$337,687,000	\$337,687,000	\$0	\$1.170	\$3,950,938	\$3,950,938	\$0	\$0	\$0	\$0	\$0	\$374,108	-\$374,108
13	2026-27	\$324,180,000	\$324,180,000	\$0	\$1.170	\$3,792,906	\$3,792,906	\$0	\$0	\$0	\$0	\$0	\$374,108	-\$374,108
14	2027-28	\$311,212,000	\$311,212,000	\$0	\$1.170	\$3,641,180	\$3,641,180	\$0	\$0	\$0	\$0	\$0	\$0	\$0
15	2028-29	\$298,764,000	\$298,764,000	\$0	\$1.170	\$3,495,539	\$3,495,539	\$0	\$0	\$0	\$0	\$0	\$0	\$0
						\$59,432,677	\$21,815,118	\$37,617,559	\$712,998	\$38,330,557	-\$5,750,413	\$32,580,144	\$5,237,506	\$27,342,638

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Tax Credit for Value Over Limit in First 2 Years

	Year 1	Year 2	Max Credits
	\$0	\$712,998	\$712,998
Credits Earned			\$712,998
Credits Paid			<u>\$712,998</u>
Excess Credits Unpaid			\$0

BOARD OF EDUCATION  
CALALLEN INDEPENDENT SCHOOL DISTRICT  
CORPUS CHRISTI, TEXAS

Date: June 17, 2013

Subject: Discuss and consider approval to retain Moak Casey as consultants to assist the District in processing of application for appraised value limitation on qualified property from Equistar Chemicals, LP.

New Business

**Action**

**BACKGROUND INFORMATION**

**ITEM ADDRESSED**

Discuss and consider approval to retain Moak Casey as consultants to assist the District in processing of application for appraised value limitation on qualified property from Equistar Chemicals, LP.

**RECOMMENDED ACTION**

The Administration recommends the Board approve retaining Moak Casey as consultants to assist the District in processing of application for appraised value limitation on qualified property from Equistar Chemicals, LP.



## CONSULTING AGREEMENT

By and Between the  
CALALLEN INDEPENDENT SCHOOL DISTRICT  
and  
MOAK, CASEY & ASSOCIATES, INC.

**MOAK, CASEY & ASSOCIATES, INC.** (“Consultant”), agrees to provide the services (“Services”) indicated in this consulting agreement (“Agreement”) in return for fees as enumerated below to the **CALALLEN INDEPENDENT SCHOOL DISTRICT** (“District”), relating to an Application for Appraised Value Limitation on Qualified Property (“Value Limitation”) from **EQUISTAR CHEMICALS, LP** (“Company”), pursuant to Chapter 313, Property Tax Code. The Services include the components listed below.

### PART I. SERVICES

Consultant shall:

- 1.1. *Brief the school board, senior administrators and community leaders:* Consultant will provide a comprehensive briefing on the mandatory procedures, rules of the Comptroller’s Office, legal risks, financial risks, and impact under the Texas school finance system.
- 1.2. *Analyze the Company’s Application Prior to Submission to the Comptroller’s Office:* Consultant will review the Company’s application in detail for completeness prior to submission to the Comptroller’s Office, in order to avoid the timeline penalties incorporated into the Chapter 313 rules.
- 1.3. *Monitor the Comptroller’s application review:* Consultant will continually monitor the Comptroller’s economic analysis and assessment of the project to ensure that all information requests and any other issues are addressed during the review process.
- 1.4. *Prepare school-finance analysis:* Consultant will use district-specific financial models to estimate impact of the proposed economic development over the full period of the Value Limitation and credit process.
- 1.5. *Negotiate with applicant company:* Consultant will undertake informal and formal negotiations with Equistar Chemicals, LP, or its representatives.

- 1.6. *Prepare enforcement contracts:* Consultant will prepare all necessary documents to be filed by the District. Where an agreement is reached between the parties, Consultant will have an executable contract prepared for the parties, and any other necessary legal documents for the District.

## **PART II. GENERAL PROVISIONS**

In performing these Services, Consultant and the District agree to the following additional terms and conditions:

- 2.1. Consultant shall be available for direct consultation with the Superintendent and Board of Trustees of the District, but shall maintain its primary contact with Edith George, its Director of Finance.
- 2.2. Services provided by Consultant shall be provided by direct staff of Consultant or through resources under subcontract, including, but not limited to, legal analysis provided by O'Hanlon, McCollom & Demerath.
- 2.3. The District shall promptly provide Consultant with necessary background information relating to financial and other pertinent data.
- 2.4. Information obtained by Consultant from the District shall remain confidential unless authorization for the release of the information has been approved by an authorized representative of the District, or unless disclosure of the information is required by the Texas Public Information Act.
- 2.5. Consultant is not an employee of the District, and is not entitled to fringe benefits, pension, workers' compensation, retirement, etc. The District shall not deduct Federal income taxes, FICA (Social Security), or any other taxes required to be deducted by an employer, as this is the responsibility of Consultant. Consultant shall indemnify and hold the District harmless from any and all liability to the Internal Revenue Service for the payment of any taxes or withholding paid to Consultant under this Agreement.
- 2.6. Nothing in this Agreement shall be construed to prevent Consultant from entering into agreements with other individual school districts or other education groups regarding financial planning, legal, consulting, and other related services that do not conflict with this Agreement.
- 2.7. No provision of this Agreement shall be construed to prevent Consultant from undertaking sponsored research or services on Texas statewide school finance issues.
- 2.8. No provision of this Agreement shall be construed to entitle the District to access to general statewide finance modeling services and analyses prepared by Consultant except as covered under Part I.
- 2.9. This Agreement shall be in force from June 17, 2013, until the Services set forth herein have been completed.

**PART III. FEES AND EXPENSES**

- 3.1. The fee shall be \$75,000 for the term of the Agreement, inclusive of expenses.
- 3.2. Fees shall be paid as follows:
  - 3.2.1. An initial amount of \$25,000 to be paid upon execution of this Contract, but only after receipt of the Company’s application fee;
  - 3.2.2. A second payment of \$25,000 shall be due upon completion of required school finance analysis, participation agreement and findings-of-fact document; and
  - 3.2.3. A third payment of \$25,000 shall be due upon completion of board action on the proposed Value Limitation.
- 3.3. All payments shall be due upon receipt of an invoice.
- 3.4. It is understood that this fee is to be paid from the Company’s application fee.

**PART IV. NOTICES AND MAILINGS**

Invoices, payments, and other official communications shall be considered delivered if mailed to the following, or to such other address as may be designated, in writing, from time to time:

- 4.1. If to Consultant:
  - Daniel T. Casey, Partner
  - MOAK, CASEY & ASSOCIATES, INC.
  - 400 W. 15<sup>th</sup> Street, Suite 1410
  - Austin, Texas 78701

- 4.2. If to Client:
  - Edith George
  - Director of Finance
  - CALALLEN CISD
  - 4205 Wildcat Drive
  - Corpus Christi, Texas 78410

DISTRICT:

CALALLEN INDEPENDENT SCHOOL DISTRICT

CONSULTANT:

MOAK, CASEY & ASSOCIATES, INC.

\_\_\_\_\_  
Printed Name: \_\_\_\_\_

\_\_\_\_\_  
Daniel T. Casey  
Partner

Date: \_\_\_\_\_

Date: \_\_\_\_\_

## **Closed Session Statement**

The Superintendent requests that the Board of Trustees convene in closed meeting as authorized by the provisions of the Open Meetings Act, Chapter 551 of the Texas Government Code. This executive session is in accordance with Section §551.074: For the purpose of considering the appointment, employment, evaluation, reassignment, duties, discipline or dismissal of a public officer or employee or to hear complaints or charges against a public officer or employee; Section 551.087 for the purpose of deliberation regarding economic negotiations.

BOARD OF EDUCATION  
CALALLEN INDEPENDENT SCHOOL DISTRICT  
CORPUS CHRISTI, TEXAS

Date: June 17, 2013

Subject: Presentation of District Architect Report

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New Business

**Action**

**BACKGROUND INFORMATION**

Ferrell and Brown, Associates Inc. assists the District with their architectural expertise. Tom Ferrell will be here to give an update on projects in the District.

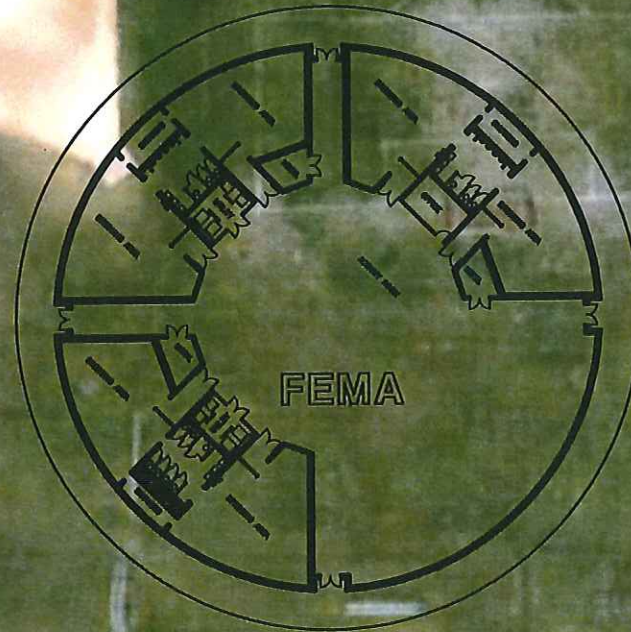
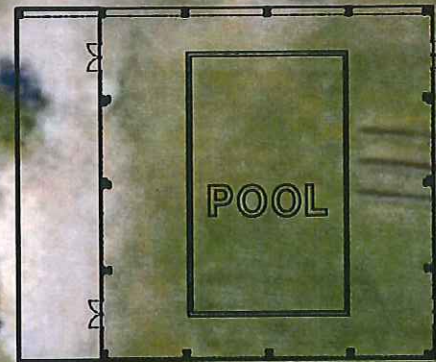
**ITEM ADDRESSED**

Presentation of District Architect Report

**RECOMMENDED ACTION**

No action necessary.

# Proposed Facility Additions



BOARD OF EDUCATION  
CALALLEN INDEPENDENT SCHOOL DISTRICT  
CORPUS CHRISTI, TEXAS

Date: June 17, 2013

Subject: Resignation and Appointments

New Business

**Action**

**BACKGROUND INFORMATION**

Calallen I.S.D. administration prepares a list of resignations and appointments since the previous Board meeting.

**ITEM ADDRESSED**

As per Personnel List presented to the Board.

**RECOMMENDED ACTION**

May require action. Some are informational purposes only.



# Personnel List June 17, 2013

## Resignations (No Action-End of Contract-Informational Only)

Name	Assignment	Campus	Reason
Jeanine Birdwell	Diagnostician	CMS/East	Resignation
Adriana Pena	Spanish	CHS	Resignation

## Appointments (No Action-Informational Only)

(The following personnel are being recommended for employment with Calallen ISD. Each employee shall be subject to assignment and reassignment of positions or duties, additional duties, changes in responsibilities or work, transfers, or reclassification at any time during the contract term.)

Name	Previous Employment	Assignment	Campus	Replacing
Alexandria Dickson Ms. Dickson has a B.S. from TAMU-CC and has zero years of teaching experience.	Private Industry	Social Studies/Coach	CMS	Abbigail Saunders
Priscilla Moore Ms. Moore has a B.S. from TAMU-K and has five years of experience in Speech Language Pathology.	Private Industry	Speech Therapist Asst.	District	New Position
Irene Olivares Ms. Olivares has a B.S. from TAM International University and has twenty years of teaching experience.	Laredo ISD	4 <sup>th</sup> Grade Reading	Magee	Daniel Canales