

**COUNTY OF LEWIS INDUSTRIAL DEVELOPMENT AGENCY**  
**UNIFORM PROJECT EVALUATION POLICY**

Pursuant to and in accordance with Section 859-a(5) of the General Municipal Law (“GML”), the County of Lewis Industrial Development Agency (the “Agency”) hereby establishes a Uniform Project Evaluation Policy for the evaluation and selection for all qualifying categories of projects for which the Agency may provide Financial Assistance (as defined herein) in accordance with its Uniform Tax Exemption Policy (“UTEP”).

For each Application for Financial Assistance received by the Agency, the following must occur prior to authorizing the project and provision of Financial Assistance:

- 1) The Agency shall undertake an assessment of all material information included in connection with the Application for Financial Assistance as necessary to afford a reasonable basis for the decision by the Agency to provide Financial Assistance for the Project, including, but not limited to qualification of the proposed project under the GML (including any retail analysis, as applicable), conducting a full application review, review of applicant financial history and project pro-formas, and consideration of all local development priorities;
- 2) A written cost-benefit analysis shall be developed by the Agency that identifies the extent to which a project will create or retain permanent, private or non-profit sector jobs, the estimated value of any tax exemptions to be provided; the amount of private or non-profit sector investment generated or likely to be generated by the proposed project; the likelihood of accomplishing the proposed project in a timely fashion; and the extent to which the proposed project will provide additional sources of revenue for municipalities and school districts; and any other public benefits that might occur as a result of the project, including the economic condition of the area at the time of the application, the effect of the proposed project upon the environment and surrounding property, and the extent to which the proposed project will provide a benefit (economic or otherwise) not otherwise available within the municipality in which the project is located;
- 3) The Agency’s Application for Financial Assistance shall include a statement by the applicant that the project, as of the date of the application, is in substantial compliance with all provisions of GML Article 18-A, including, but not limited to, the provisions of GML Section 859-a(5) and 862(1); and
- 4) If the proposed project involves the removal or abandonment of a facility or plant within the State of New York, the Agency shall notify the chief executive officer or officers of the municipality or municipalities in which the facility or plant was located.

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Required State Criteria, Material Terms & Evaluative Criteria

State Required Criteria	Project Type	Material Terms (Suggested)	Evaluative Criteria (Suggested)
<ol style="list-style-type: none"> <li>1. Extent to which a project will create or retain permanent jobs</li> <li>2. Estimated value of tax exemptions</li> </ol>	<p><b><u>Manufacturing, Warehouse, Distribution</u></b></p>	<ol style="list-style-type: none"> <li>1. Create or Retain Jobs</li> <li>2. Private Sector Investment</li> <li>3. Local Labor Construction</li> <li>4. Wage Rates above Median Wage for Area</li> <li>5. Community Benefit</li> </ol>	<ol style="list-style-type: none"> <li>1. Wage Rates (above Median Wage for Area)</li> <li>2. Regional Wealth Creation (% Sales/Customers Outside Area)</li> <li>3. In Region Purchases (% of overall Purchases)</li> <li>4. Research and Development Activities</li> <li>5. Investments in Energy Efficiency</li> <li>6. Locational Land Use Factors, Brownfields or Locally Designated Development Areas</li> <li>7. LEED/Renewable Resources</li> <li>8. Retention/Flight Risk</li> </ol>
<ol style="list-style-type: none"> <li>3. Amount of private sector investment</li> <li>4. Likelihood of project being accomplished in a timely fashion</li> <li>5. Extent of new revenue provided to local taxing jurisdictions</li> <li>6. Any other misc. public benefits</li> </ol>	<p><b><u>Agricultural, Food Processing</u></b></p>	<ol style="list-style-type: none"> <li>1. Create or Retain Jobs</li> <li>2. Private Sector Investment</li> <li>3. Local Labor Construction</li> <li>4. Wage Rates above Median Wage for Area</li> <li>5. Community Benefit</li> </ol>	<ol style="list-style-type: none"> <li>1. Wage Rates (above Median Wage for Area)</li> <li>2. Regional Wealth Creation (% Sales/Customers Outside Area)</li> <li>3. In Region Purchases (% of overall Purchases, from Local Growers)</li> <li>4. Research and Development Activities</li> <li>5. Investments in Energy Efficiency</li> <li>6. Locational Land Use Factors, Proximity to Local Ag. Production</li> <li>7. LEED/Renewable Resources</li> <li>8. Retention/Flight Risk</li> </ol>

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State Required Criteria	Project Type	Material Terms (Suggested)	Evaluative Criteria (Suggested)
<ol style="list-style-type: none"> <li>1. Extent to which a project will create or retain permanent jobs</li> <li>2. Estimated value of tax exemptions</li> <li>3. Amount of private sector investment</li> <li>4. Likelihood of project being accomplished in a timely fashion</li> <li>5. Extent of new revenue provided to local taxing jurisdictions</li> <li>6. Any other misc. public benefits</li> </ol>	<p><b><u>Adaptive Reuse, Community Development</u></b></p>	<ol style="list-style-type: none"> <li>1. Private Sector Investment</li> <li>2. Retain or Create Jobs (if applicable)</li> <li>3. Local Labor Construction</li> <li>4. Increased Property Value</li> <li>5. Increased Revenue to Local Taxing Jurisdictions</li> <li>6. Community Benefit</li> </ol>	<ol style="list-style-type: none"> <li>1. Distressed Census Tracts</li> <li>2. Age of Structure</li> <li>3. Elimination of Slum and Blight</li> <li>4. Building or Facility Vacancy</li> <li>5. Redevelopment Supports Local Community Development Plan</li> <li>6. Environmental or Safety Issues</li> <li>7. LEED/Renewable Resources</li> <li>8. Building or site has Historic designation</li> <li>9. Site or Structure has delinquent Property or other local Taxes</li> <li>10. Project/Developer's Return on Investment</li> <li>11. Impediments to Conventionally Finance Project</li> </ol>
	<p><b><u>Tourism</u></b></p>	<ol style="list-style-type: none"> <li>1. Private Sector Investment</li> <li>2. Create or Retain Jobs (if applicable)</li> <li>3. Local Labor Construction</li> <li>4. Regional Wealth Creation (% Sales/Customers Outside Area)</li> <li>5. Community Benefit</li> </ol>	<ol style="list-style-type: none"> <li>1. Market Study (Document Demand and Impact on Existing Operators)</li> <li>2. Regional Wealth Creation</li> <li>3. Proximity/Support of Regional Tourism Attractions/Facilities</li> <li>4. Local Official(s), Convention Visitors Bureau Support</li> <li>5. In Region Purchases, Support of Local Vendors</li> <li>6. LEED/Renewable Resources</li> </ol>

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			7. Generation of Local Revenues (i.e. Hotel Bed Taxes)
	<b><u>Retail</u></b>	<ol style="list-style-type: none"> <li>1. Private Sector Investment</li> <li>2. Create or Retain Jobs (if applicable)</li> <li>3. Local Labor Construction</li> <li>4. Regional Wealth Creation (% Sales/Customers Outside Area)</li> <li>5. Community Benefit</li> </ol>	<ol style="list-style-type: none"> <li>1. Market Study/Goods or Services Not Readily Available, Impact on Existing Businesses (Municipal CEO approval)</li> <li>2. Regional Wealth Creation</li> <li>3. Highly Distressed Census Tracts</li> <li>4. Urban or Town Center Location</li> <li>5. Elimination of Slum and Blight</li> <li>6. Alignment with Local Planning and Development Efforts</li> </ol>
<ol style="list-style-type: none"> <li>1. Extent to which a project will create or retain permanent jobs</li> <li>2. Estimated value of tax exemptions</li> <li>3. Amount of private sector investment</li> <li>4. Likelihood of project being accomplished in a timely fashion</li> <li>5. Extent of new revenue provided to local taxing jurisdictions</li> </ol>	<b><u>Back Office, Data, Call Centers</u></b>	<ol style="list-style-type: none"> <li>1. Private Sector Investment</li> <li>2. Create or Retain Jobs (if applicable)</li> <li>3. Local Labor Construction</li> <li>4. Wage Rates above Median Wage for Area</li> <li>5. Community Benefit</li> </ol>	<ol style="list-style-type: none"> <li>1. Wage Rates (above Median Wage for Area)</li> <li>2. Regional Wealth Creation (% Sales/Customers Outside Area)</li> <li>3. In Region Purchases (% of Purchases from Local Vendors)</li> <li>4. Supports Local Business or Cluster</li> <li>5. Retention/Flight Risk</li> <li>6. LEED/Renewable Resources</li> </ol>

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6. Any other misc. public benefits			
<b>State Required Criteria</b>	<b>Project Type</b>	<b>Material Terms (Suggested)</b>	<b>Evaluative Criteria (Suggested)</b>
<ol style="list-style-type: none"> <li>1. Extent to which a project will create or retain permanent jobs</li> <li>2. Estimated value of tax exemptions</li> </ol>	<p style="text-align: center;"><b><u>Energy Production</u></b></p>	<ol style="list-style-type: none"> <li>1. Private Sector Investment</li> <li>2. Create or Retain Jobs (if applicable)</li> <li>3. Local Labor Construction</li> <li>4. Wage Rates above Median Wage for Area</li> <li>5. Community Benefit</li> </ol>	<ol style="list-style-type: none"> <li>1. Wage Rates (above Median Wage for Area)</li> <li>2. In Region Purchases (% of Overall Purchases, Local Construction Jobs/Suppliers)</li> <li>3. Advances Renewable Energy Production/Transmission Goals</li> <li>4. Provides Capacity or Transmission to Meet Local Demand or Shortage</li> <li>5. Community Benefit</li> <li>6. Location of Project (prime vs. Marginal land)</li> </ol>

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<ol style="list-style-type: none"> <li>3. Amount of private sector investment</li> <li>4. Likelihood of project being accomplished in a timely fashion</li> <li>5. Extent of new revenue provided to local taxing jurisdictions</li> <li>6. Any other misc. public benefits</li> </ol>	<p><b><u>Market Rate Senior Housing</u></b></p>	<ol style="list-style-type: none"> <li>1. Private Sector Investment</li> <li>2. Create or Retain Jobs (if applicable)</li> <li>3. Local Labor Construction</li> <li>4. Senior Residents at or Below Median Income for Community</li> <li>5. Community Benefit</li> </ol>	<ol style="list-style-type: none"> <li>1. Market Study (Document Need and Impact on Existing Facilities)</li> <li>2. Highly Distressed Census Tract</li> <li>3. Alignment with Local Planning and Development Efforts</li> <li>4. Urban, Town/Village Center Location</li> <li>5. Local Official(s) Support</li> <li>6. Located in Areas that Serve Below Median Income Seniors</li> <li>7. Facility Promotes Walkable Community Areas</li> <li>8. Review of Project/Developer's Return on Investment</li> <li>9. Ability to Conventionally Finance</li> <li>10. Provides Specific Senior Amenities (Community Rooms, Health Services etc.)</li> <li>11. Senior Residents at or Below Median Income for Community</li> </ol>
<p><b>State Required Criteria</b></p>	<p><b>Project Type</b></p>	<p><b>Material Terms (Suggested)</b></p>	<p><b>Evaluative Criteria (Suggested)</b></p>
<ol style="list-style-type: none"> <li>1. Extent to which a project will create or retain permanent jobs</li> <li>2. Estimated value of tax exemptions</li> <li>3. Amount of private sector investment</li> </ol>	<p><b><u>Commercial Housing</u></b></p>	<ol style="list-style-type: none"> <li>1. Private Sector Investment</li> <li>2. Create or Retain Jobs (if applicable)</li> <li>3. Local Labor Construction</li> <li>4. Community Benefit</li> </ol>	<ol style="list-style-type: none"> <li>1. Market Study (Document Unmet Need and Impact on Existing Facilities)</li> <li>2. Highly Distressed Census Tracts</li> <li>3. Alignment with Local Planning and Development Efforts</li> <li>4. Urban or Town/Village Center Location</li> <li>5. Local Official(s) Support</li> <li>6. Located in Areas that have Inadequate Housing Supply</li> </ol>

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<p>4. Likelihood of project being accomplished in a timely fashion</p> <p>5. Extent of new revenue provided to local taxing jurisdictions</p> <p>6. Any other misc. public benefits</p>			<p>7. Facility Promotes Transit Oriented or Walkable Community Areas</p> <p>8. Review of Project/Developer's Return on Investment</p> <p>9. Impediments to Ability to Conventionally Finance Project</p>
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