



Identify the assistance being requested of the Agency

Exemption from Sales Tax	<b>Yes</b>
Tax Exempt Financing	<b>No</b>
Exemption from Mortgage Tax	<b>No</b>
Exemption from Real Property Tax	<b>Yes</b>
Assignment/Assumption of existing PILOT benefits	<b>No</b>

Business Organization

Type of Business	<b>Public Corporation</b>
Year Established	<b>1875</b>
State of Organization	<b>New York</b>

List all stockholders, members, or partners with % of ownership greater than 20%  
Please include name and % of ownership.

**None**

Business Description

Describe in detail company background, products, customers, goods and services

**We are a leading global designer manufacturer and marketer of hoist, rigging tools, cranes, actuators, and other material handling products serving a wide variety of commercial and industrial end-user markets. Our products are used to efficiently and ergonomically move, lift, position and secure objects and loads.**

Estimated % of sales within Erie County	<b>1.5</b>
Estimated % of sales outside Erie County but within New York State	<b>.5</b>
Estimated % of sales outside New York State	<b>55.0</b>
Estimated % of sales outside the U.S.	<b>43</b>

What percentage of your total annual supplies, raw materials and vendor services are purchased from firms in Erie County?  
(You may be asked to provide supporting documentation of the estimated percentage of local purchases)

**3.5%**

## Section II: Project Description & Details

Location of proposed project facility

Address **205 Crosspoint Parkway**  
City Amherst  
State **New York**  
Zip Code 14068  
SBL Number 28.00-1-64.111  
Town/City/Village Amherst  
School District Williamsville  
Present Project Site Owner **United States**

Please provide a brief narrative of the project

**Columbus McKinnon is investigating a new global headquarter location and training center. We are considering locations both inside and outside New York. In order to maintain the global headquarters and training center in Amherst we will need to economically justify our decision.**

Site Characteristics

Is the proposed Project located on a site where the known or potential presence of contaminants is complicating the development/use of the property?

**No**

If yes, please explain

Has a Phase I Environmental Assessment been prepared, or will one be prepared with respect to the proposed Project Site?  
(If yes, please provide copy)

**Yes**

**If yes, please provide a copy.**

Have any other studies, or assessments been undertaken with respect to the proposed Project Site that indicate the known or suspected presence of contamination that would complicate the site's development?

**No**

**If yes, please provide copies of the study.**

Will project include leasing any equipment?

**No**

**If yes, please describe equipment and lease terms**

If you are purchasing new machinery and equipment, does it provide demonstrable energy efficiency benefits?

**Yes**

**If yes, please attach additional documentation describing the efficiencies achieved.**

Does or will company perform substantial research and development activities on new products/services at the project location?

**Yes**

**If yes, please explain**

**As part of the training center, we will conduct product inspections and other testing of our hoists and rigging products.**

What percentage of annual operating expenses are attributed to the above referenced research and development activities?

**Working on budget and testing protocols.**

Explain why IDA participation is necessary for this project to proceed. Focus on competitiveness issues, project shortfalls, etc.

**Columbus McKinnon is reviewing options for a new headquarter facility in order to maintain its presence in Western New York. Incentives from the Amherst IDA would be vital to the economics in making a decision. In coming to a final decision offers from other states are being considered.**

Project Information  
 Estimated costs in connection with project

Land and/or Building Acquisition	\$ 504000
3.50 acres 0.00 square feet	
New Building Construction	\$ 4766000
30000.00 square feet	
New Building addition(s)	\$ 0
0.00 square feet	
Renovation	\$ 0
0.00 square feet	
Manufacturing Equipment	\$ 0
Non-Manufacturing Equipment: (furniture, fixtures, etc.)	\$ 500000
Soft Costs: (professional services, etc.)	\$ 145000
Other Cost	\$ 0

5168  
 2650  
 3,108  
 82,760  
 NRG - \$386,412  
 current annual  
 250,215  
 43,750  
 \$293,965 sales tax  
 \$941,640 prop. tax  
 \$59,150 mort. tax

**Explain Other Costs**

**Total Cost 5915000**

**Project Refinancing (est. amount) 0**

Select Project Type (check all that apply)

- |  |                        |   |
|--|------------------------|---|
| <b>No Industrial</b>                       | <b>No Multi-Tenant</b> | <b>No Mixed Use</b>                       |
| <b>No Acquisition of Existing Facility</b> | <b>No Commercial</b>   | <b>No Facility for the Aging</b>          |
| <b>No Housing</b>                          | <b>Yes Back Office</b> | <b>No Civic Facility (not for profit)</b> |
| <b>No Equipment Purchase</b>               | <b>No Retail</b>       | <b>No Other</b>                           |

**SIC Code 3531**

**NAICS Code 333923**

For proposed facility please include # of sq ft for each of the uses outlined below

		Cost	% of Total Cost
Manufacturing/Processing	0 square feet	0	0
Warehouse	0 square feet	0	0
Research & Development	0 square feet	0	0
Commercial	0 square feet	0	0
Retail	0 square feet	0	0
Office	25900 square feet	5027	85
Specify Other	4100 square feet	887	15

→ 4,051,100  
 714,900  
 Land 400,000  
 Bldg. 4,200,000

Utilities and services presently serving site. Provide name of utility provider

**Gas**  
**Electric**      **Size**  
**Water**        **Size**  
**Sewer**        **Size**

**Other (Specify)**

If you are undertaking new construction or renovations, are you seeking LEED certification from the US Green Building Council?

**Yes**

If you answered yes to question above, what level of LEED certification do you anticipate receiving? (Check applicable box)

**Standard**

What is your project timetable (Provide dates)

Start date : acquisition of equipment

**2014-09-01**

End date : Estimated completion of project

**2015-09-01**

Project occupancy : estimated starting date of operations

**2015-09-01**

Have site plans been submitted to the appropriate planning department for approval?

**No**

Have any expenditures already been made by the company?

**No**

If yes, indicate particulars (Amherst IDA benefits do not apply to expenses incurred prior to Board approval)

Is project necessary to expand project employment?

**Yes**

Is project necessary to retain existing employment?

**Yes**

Employment Plan (Specific to location):

	Current # of jobs at project location or to be relocated at project location	If project is to retain jobs, number of jobs to be retained	Total # of jobs 2 years after project completion
Full time	0	130	140
Part time	0	0	0
Total	0	130	140

**If you estimated new job growth over the next 2 years, please provide a short description of how those estimates were calculated (i.e. jobs per square foot, new contracts/increased revenues, etc.)**

**Based on business needs**

Employment at other locations in Erie County: (provide address and number of employees at each location):

Address	One Fremont St. Tonawanda, NY 14150	Sales Representatives	
Full time	7	4	0
Part time	0	0	0
Total	7	4	0

Payroll Information

Annual payroll

**17106000**

Estimated average annual salary of jobs to be retained

**121000**

Average estimated annual salary of jobs to be created

**75000**

Estimated salary range of jobs to be created

From **40000** To **160000**

Is the project reasonably necessary to prevent the project occupant from moving out of New York State?

**Yes**

If yes, please explain and identify out-of-state locations investigated

**Multiple locations with the State of North Carolina**

Were you offered financial assistance to locate outside of New York State?

**Yes**

If yes, from whom and what type of assistance was offered

**Various incentive agencies within North Carolina**

What competitive factors led you to inquire about sites outside of New York State?

**Columbus McKinnon has manufacturing facilities in the Charlotte area. We have approximately 400 people at these facilities and two other manufacturing facilities within a few hours from Charlotte.**

Have you contacted or been contacted by other economic or governmental agencies regarding this project?

**Yes**

If yes, please indicate the Agency and nature of inquiry below

**Various New York State and North Carolina agencies have reached out to us for different incentives.**



### Section III: Adaptive Reuse Projects

Are you applying for a tax incentive under the Adaptive Reuse Program?

No

What is the age of the structure (in years)?

0.00

If yes, number of years vacant?

0

Has the structure been vacant or underutilized for a minimum of 3 years? (Underutilized is defined as a minimum of 50% of the rentable square footage of the structure being utilized for a use for which the structure was not designed or intended)

<BLANK>

Is the structure currently generating insignificant income? (Insignificant income is defined as income that is 50% or less than the market rate income average for that property class)

<BLANK>

Does the site have historical significance?

<BLANK>

Briefly summarize the financial obstacles to development that this project faces without Amherst IDA or other public assistance. Please provide the Amherst IDA with documentation to support the financial obstacles to development (cash flow projections documenting costs, expenses and revenues indicating below average return on investment rates compared to regional industrial averages)

Briefly summarize the demonstrated support that you intend to receive from local government entities. Please provide the Amherst IDA with documentation of this support in the form of signed letters from these entities

Please indicate other factors that you would like the Amherst IDA to consider such as: structure or site presents significant public safety hazard and or environmental remediation costs, site or structure is located in a distressed census tract, structure presents significant costs associated with building code compliance, site or structure is presently delinquent in property tax payments

## Section IV: Retail Determination

Will project involve the sales of goods or services to customers who personally visit the facility?

**No**

If yes, complete the Retail Questionnaire Supplement below.

Will any portion of the project consist of facilities or property that is primarily used in making sales of goods or services to customers who personally visit the project site?

**No**

If the answer is yes, please continue.

What percentage of the cost of the project will be expended on such facilities or property primarily used in making sales of goods or services to customers who personally visit the project?

**0.00 %**

If the answer to this is **less than 33%** do not complete the remainder of the page and proceed to the next section (Section V: Inter-Municipal Move Determination).

Will the project be operated by a not-for-profit corporation?

**No**

Is the project likely to attract a significant number of visitors from outside the economic development region in which the project will be located?

**Yes**

If yes, please provide a market analysis or other documentation supporting your response.

Would the project occupant, but for the contemplated financial assistance from the industrial development agency, locate the related jobs outside the State of New York?

**Yes**

If yes, please provide documentation regarding investigation of sites outside New York State.

Is the predominant purpose of the project to make available goods or services which would not otherwise be reasonably accessible to the residents of the project municipality?

**No**

If yes, please provide a market analysis supporting your response.

Will the project preserve permanent, private sector jobs or increase the overall number of permanent private sector jobs in the State of New York?

**Yes**

Is the project located in a Neighborhood Redevelopment Area?

**No**

## Section V: Inter-Municipal Move Determination

Does this project involve relocation or consolidation of a project occupant from another municipality or abandonment of an existing facility?

**Within New York State** Yes

**Within Erie County** Yes

If EITHER IS YES, please complete the following. If BOTH ARE NO, please 'save and continue' to the next section (Section VI: Facility Type - Single or Multi Tenant).

The Agency is required by state law to make a determination that Agency assistance is required to prevent the project occupant from relocating out of the state, or to preserve the project occupant's competitive position in its respective industry.

Will the project result in a relocation of an existing business operation from the City of Buffalo?

**No**

If yes, please explain the factors which require the project occupant to relocate (For example, present site is not large enough, or owner will not renew leases etc.)

What are some of the key requirements the project occupant is looking for in a new site? (For example, minimum sq. ft., 12 foot ceilings, truck loading docs etc...)

**Greenfield construction, training center, International Corporate head quarters**

If the project occupant is currently located in Erie County and will be moving to a different municipality, has the project occupant attempted to find a suitable location within the municipality?

**Yes**

Is the project reasonably necessary to preserve the project occupant's competitive position in its industry?

**Yes**

If yes, please explain and provide supporting documentation

**Global headquarters is an economic decision for company.**

What factors have lead the project occupant to consider remaining or locating in Erie County?

**Having a current presence in Western New York.**

What is going to happen to the current facility that project occupant is located in?

**Existing Landlord will look to lease.**

Please provide a list of properties considered, and the reason they were not adequate. (Some examples include: site not large enough, layout was not appropriate, did not have adequate utility service, etc.) Please include full address for locations.

**Various existing sites within Erie County, specifically Amherst, Cheektowaga and Tonawanda, were examined and deemed not suitable. Various greenfield sites were also examined in Amherst and Cheektowaga and Crosspoint, located in Amherst, was chosen.**

## Section VI: Facility Type - Single or Multi Tenant

Is this a Single Use Facility or a Multi-Tenant Facility?

**Single Use Facility**

### For Single Use Facility

Occupant Name      **Columbus McKinnon Corporation**  
Address              **140 John James Audubon Parkway**  
Contact Person      **Greg Rustowicz**  
Phone                **716-689-5400**  
Fax                    **716-689-5400**  
E-Mail                **greg.rustowicz@cmworks.com**  
Federal ID #        **16-0547600**  
SIC/NAICS Code    **3531/333923**

### Multi-Tenant Facility

Please explain what market conditions support the construction of this multi-tenant facility

Have any tenant leases been entered into for this project?

<BLANK>

If yes, please list below and provide square footage (and percent of total square footage) to be leased to tenant and NAICS Code for tenant and nature of business