

Dallas County
Business Personal Property Tax Abatement Application 3/2/15

- Applicant: Amazon.com.kydc, LLC
- Applicant Address: 410 Terry Ave North, Seattle, WA 98109
- Applicant Contact: Eric Murray, Sr. Manager, Economic Development /202-763-5024
[REDACTED]
- Site Address: 33333 LBJ FRWY, Dallas, TX
- Project Size: 500,000 square feet
- Project Launch Date Q3/2015 to Q1/2016
- Project Description: Receive Center supporting Amazon's Fulfillment Network
- Full time Jobs: Minimum of 500 Jobs /yr (See proposed Project terms discussed 3/2/15)
- Job Categories and Description: See Attachment # 1 for detailed description by position type
 - Fulfillment Associate
 - Lead Fulfillment Associate – Training & Team Leaders
 - Lead Fulfillment Associate – Data, Flow and Inventory Leaders
 - Area Manager
 - Operations Manager
- **Salary Bands**
 - Associate \$26K – 33K/yr.
 - Management \$70K/yr. +
 - Variable Pay
 - If employees work in a fulfillment center they may be eligible for Variable Pay, a bonus based upon personal and site performance criteria at the location.
 - Restricted Stock Units - Subject to approval by the Board of Directors of Amazon.com, Inc., employees will be granted a restricted stock unit award.
- **Benefits:** <http://www.amazon.jobs/benefits/us-benefits-and-stock>
 - Employees will also be entitled, during the term of their employment, to such vacation, medical, 401k, and other employee benefits as the Company may offer from time to time, subject to applicable eligibility requirements.
 - Successful candidates will be required to pass a post offer, pre-employment drug screen and a background check in accordance with all federal, state and local laws.
 - Amazon is an Equal Opportunity-Affirmative Action Employer Minority/Female/Disability/Vet.
- EEO-1/work force composition report for Amazon.com.kydc, LLC. See Attachment #2

PROPOSED PROJECT PARAMETERS

3/2/15

- 10 yr, 50% Dallas County Business Personal Property Tax abatement worth about~\$200K (and up to \$300K* if certain milestones are achieved)
 - Minimum Commitment:
 - 500 FTE (any combination of # of employees equaling 35 hrs/week)
 - \$30K/yr Average W2
 - \$17M Personal Property Tax base for 10yrs

MILESTONE TARGETS:

In any year (including the first) if:

- Amazon.com.kydc, LLC achieves 700 FTE abatement will increase to 62.5% for that year; or
- Amazon.com.kydc, LLC achieves 900 FTE abatement will increase to 75% for that year.
- \$30K/yr Average Annual W-2 of the 500, 700 or 900 population remains the same in any year;
- \$17M Personal Property Tax Base remains the same in any year;

ADDITIONAL PROPOSED PROJECT PARAMETERS:

- Incentive is earned as we go, however if Amazon.com.kydc, LLC fails to meet the minimum in any year of 500FTE, \$17M BPP Base or \$30K/yr for the respective population, then the Agreement may be revoked but there is no clawback for prior years' incentives
- Amazon.com.kydc, LLC will have until 12/31/16 to meet its initial commitments if needed.

The above Project Parameters proposed by Amazon.com.kydc, LLC are non-binding and for discussion purposes only.

Attachment #1
Job Descriptions and Qualifications by Position

- **Fulfillment Associate -**

The Fulfillment Associate position may be required to receive products using radio frequency scanners, relocate products using forklifts, pallet jacks and walkie-riders. They also may also be required to pick customer orders on all levels of a multi-level mezzanine, pack and ship customer orders, receive product and troubleshoot problems to resolution. Fulfillment associates are expected to understand aspects of production; adhere to strict safety, quality, and production standards. Dependent on business need, position may require for associate to be willing and able to work on powered equipment (i.e forklift or cherry picker).

Basic Qualifications

- Must be at least 18 years old
- Must have a High School diploma or equivalent
- Must be willing and able to work all shifts
- Must be willing and able to work overtime as required
- Must be able to read and take direction in English
- Must be able to lift up to 49 pounds with or without reasonable accommodation
- Must be able to stand/walk for up to 10-12 hours
- Must be willing and able to frequently push, pull, squat, bend, and reach
- Must be able to continuously climb and descend stairs safely (applies to sites with stairs)
- Must be able to work on a secure mezzanine at a height of up to 40 feet (applies to buildings with mezzanines)
- Must be willing and able to work on powered equipment-for example forklift or cherry picker

- **Lead Fulfillment Associate – Training & Team Leaders**

Lead Fulfillment Associates hold various roles within the Fulfillment Center. While there are several types of roles that hold different job-specific responsibilities, common job elements for Training & Team Leaders include:

- Leading trainings/and or start of shift meetings to a group of 20+ associates
- Coaching, training and communicating with associates and managers
- Talking in front of a group as well as one-on-one with an individual
- Giving and receiving effective feedback
- Troubleshooting problems through to resolution, escalating as necessary
- Performing production duties as needed: pick/pack orders, receive/stow product, ensure inventory accuracy, and unload/load trucks at or above the rate expectation for each task
- Participating in Lean/Kaizen, Black Belt, and other process improvement initiatives in some capacity
- Assisting in keeping work area clean and organized

Basic Qualifications

- Must be at least 18 years old
 - Must have a High School diploma or equivalent
 - Must be willing and able to work all shifts
 - Must be willing and able to work overtime as required
 - Must be able to read and take direction in English
 - Must be able to lift up to 49 pounds with or without reasonable accommodation
 - Must be able to stand/walk for up to 10-12 hours
 - Must be willing and able to frequently push, pull, squat, bend, and reach
 - Must be able to continuously climb and descend stairs safely (applies to sites with stairs)
 - Must be able to work on a secure mezzanine at a height of up to 40 feet (applies to buildings with mezzanines)
 - Must be willing and able to work on powered equipment (for example, a forklift or cherry picker)
- **Lead Fulfillment Associate – Data, Flow and Inventory Leaders**
Lead Fulfillment Associates hold various roles within the Fulfillment Center. While there are several types of roles that hold different job-specific responsibilities, common job elements for Data, Flow and Inventory Leaders include:

- Researching, analyzing and interpreting data and trends
- Creation, communication and monitoring of inventory flow and/or scheduling
- Frequent use of math and logic
- Communicating with fellow employees, managers and vendors to coordinate activities according to needs
- Participating as onsite escalation contact, where and when appropriate
- Training and supporting associates and managers
- Extensive use of computers and various web based programs
- Performing production duties as needed: pick/pack orders, receive/stow product, ensure inventory accuracy, and unload/load trucks at or above the rate expectation for each task
- Troubleshooting problems through to resolution, escalating to Area Manager as necessary
- Participating in Lean/Kaizen, Black Belt, and other process improvement initiatives in some capacity
- Assisting in keeping work area clean and organized

Basic Qualifications

- Must be at least 18 years old
- Must have a High School diploma or equivalent
- Must be willing and able to work all shifts
- Must be willing and able to work overtime as required

- Must be able to read and take direction in English
- Must be able to lift up to 49 pounds with or without reasonable accommodation
- Must be able to stand/walk for up to 10-12 hours
- Must be able to frequently push, pull, squat, bend, and reach
- Must be able to continuously climb and descend stairs safely (applies to sites with stairs)
- Must be able to work on a secure mezzanine at a height of up to 40 feet (applies to buildings with mezzanines)
- Must be willing and able to work on powered equipment (for example, a forklift or cherry picker)

Area Manager

Four key areas that you'll always focus on are the safety, quality, customer experience, and productivity of your department.

- Review the work forecasts and determine your productivity requirements to produce during the day to meet the overall building objectives.
- Partner with other Area Managers to balance labor ensuring that you are operating a balanced and efficient shift while meeting all of your goals.
- Support all safety programs and OSHA compliance to ensure a safe work environment for all associates.
- Proactively identify and lead process improvement initiatives and Lean tools

SUPERVISORY RESPONSIBILITIES:

You and your team of warehouse associates are responsible for getting Amazon customers their orders. You are responsible for ensuring that you have properly trained people, and that their needs are addressed so they can focus on their jobs.

In addition, one of the most important aspects of your job is to lead change at internet speed.....innovation has made us the global company that we are today.

Additional Job Elements:

- Lift and move totes up to 49 pounds each
- Regular bending, lifting, stretching and reaching both below the waist and above the head
- Walking in the FC and around area with great frequency; facilities are over a quarter mile in length;
- Must be able to stand/walk for up to 10-12 hours
- Should be able to work in environments with variable noise levels, lighting conditions and temperature variation
- Able to access all areas of building (ascending and descending ladders, stairs, gangways safely and without limitation)

BASIC QUALIFICATIONS:

- A completed Bachelor's Degree from an accredited university

-
-
-
- Authorized to work in the U.S. without sponsorship
 - Direct management experience for employees and their performance
 - Experience with performance metrics and process improvement (how, when, who)
 - Candidates must be flexible to work weekends and/or overnight shifts regularly
- **Operations Manager**
 - Responsibilities:**
 - Lead and supervise a team of Area Managers (2-5 front-line supervisors depending on location) and 100-300 hourly associates in outbound or inbound operations within the Fulfillment Center.
 - Responsible for the overall safety, quality and performance and customer experience of the shift.
 - Carry out supervisory responsibilities in accordance with the organization's policies and procedures.
 - Accountability for meeting and exceeding operational goals.
 - Strategic planning and forecasting; appraise performance; reward and discipline employees; resolve problems; and address staffing needs.
 - Mentor, train and develop teammates for career progression and learning
 - Ability to develop and share best practices across the shifts and network.
 - This position requires a candidate with the proven ability to drive process improvements and the ability to keep pace with our explosive growth while motivating others to meet the challenges of an extremely deadline-driven environment.

Additional Job Elements:

- Lift and move totes up to 49 pounds each
- Regular bending, lifting, stretching and reaching both below the waist and above the head
- Walking in the FC and around area with great frequency; facilities are over a quarter mile in length
- Must be able to stand/walk for up to 10-12 hours
- Should be able to work in environments with variable noise levels, lighting conditions and temperature variation
- Able to access all areas of building (ascending and descending ladders, stairs, gangways safely and without limitation)

Basic Qualifications:

- A completed Bachelor's Degree from an accredited university or 2+ years Amazon experience
- Direct management experience for a salaried employee population and its performance
- Experience with performance metrics, process improvement, and Lean techniques (how, when, who)
- Candidates must be flexible to work weekends and/or overnight shifts regularly

Attachment #2
EEO1 Report

AMAZON.com Inc. LLC
EEO-1 REPORT
AS OF 7/1/14

EEO-1 Code	Hispanic/Latino		Race										Total		
	Male	Female	White	Black/African American	Hawaiian/Pacific Islander	Native American	Two or More Races	White	Black/African American	Hawaiian/Pacific Islander	Native American	Two or More Races			
1.1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
1.2 Officials and Managers	29	7	431	55	28	1	12	96	16	0	0	6	0	4	645
3 Professionals	11	5	91	12	0	0	0	68	11	0	5	0	1	1	279
3 Technicians	3	2	35	3	0	0	0	27	4	0	0	0	0	1	75
4 Sales	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5 Office and Clerical	1	9	68	12	0	1	3	131	27	0	3	1	3	3	260
6 Craft Workers	9	0	130	117	0	4	2	1	1	0	0	0	0	0	158
7 Operators	57	14	609	117	3	13	29	282	50	1	1	4	7	7	1,190
8 Laborers	364	280	3,819	1,778	16	184	23	1,777	3,166	1,605	13	131	21	135	11,662
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	474	317	5,183	1,937	20	255	30	222	3,786	1,714	14	146	26	151	14,289

Rick Loessberg

From: Rick Loessberg
Sent: Thursday, April 02, 2015 11:32 AM
To: 'Murray, Eric'
Subject: RE: Dallas County Application - Confidential Information

Looks like it will be on the April 14 agenda. The agenda (which will list this item) will be released/made available to the public on April 10.

Thanks again for all of your help.

-----Original Message-----

From: Murray, Eric [mailto: [REDACTED]]
Sent: Wednesday, April 01, 2015 2:03 PM
To: Rick Loessberg
Cc: Lee Higgins
Subject: RE: Dallas County Application - Confidential Information

Thank you

Just let me know which date we'll be on the agenda.

Will there be a public notice that goes out in advance of the meeting?

-----Original Message-----

From: Rick Loessberg [mailto:Rick.Loessberg@dallascounty.org]
Sent: Wednesday, April 01, 2015 2:59 PM
To: Murray, Eric
Subject: Re: Dallas County Application - Confidential Information

Yes.

Sent from my iPhone

> On Apr 1, 2015, at 11:01 AM, "Murray, Eric" < [REDACTED] > wrote:

>
> So we're good with the Agreement?

>
>
> Thanks

> -----Original Message-----

> **From:** Rick Loessberg [mailto:Rick.Loessberg@dallascounty.org]
> **Sent:** Wednesday, April 01, 2015 11:54 AM
> **To:** Murray, Eric
> **Subject:** Re: Dallas County Application - Confidential Information

>
> Thank you for ALL of your help--I really appreciate it. I'm in a series of meetings outside of the office today. I'm not sure I will be able to coordinate getting the signatures so that the item can be on the April 7 agenda, but I will try.

>

> Sent from my iPhone

>

>> On Apr 1, 2015, at 8:31 AM, "Murray, Eric" <[REDACTED]> wrote:

>>

>> Rick

>>

>> Thanks for the time this week to get this across the finish line. We have accepted the original language as-is.

>>

>> See attached.

>>

>> Will we be on the April 7th Agenda?

>>

>> Eric

>>

>>

>>

>> -----Original Message-----

>> From: Rick Loessberg [mailto:Rick.Loessberg@dallascounty.org]

>> Sent: Monday, March 30, 2015 8:30 AM

>> To: Murray, Eric

>> Subject: RE: Dallas County Application - Confidential Information

>>

>> I really appreciate you trying to get this resolved. The latest revision is a lot closer, but still not there because the job generation requirement does not overtly say that jobs can't be moved from another Dallas County location. That's why I wanted to have the reference to the economic activity having to be in compliance with the County's abatement policy (court order 2015-0054).

>>

>> Perhaps we should have a phone call with everyone. I should generally be around all day. My cell is [REDACTED]

>>

>> Thanks.

>>

>> -----Original Message-----

>> From: Murray, Eric [mailto:[REDACTED]]

>> Sent: Friday, March 27, 2015 8:39 PM

>> To: Rick Loessberg

>> Subject: RE: Dallas County Application - Confidential Information

>>

>> Rick

>>

>> Working OT on this one to try and wrap it up. We have accepted all prior changes so that only the recent proposed change by our attorney to Section VII is highlighted in the attached.

>>

>> For context, we do not believe it is necessary to look to the Court Order to confirm our obligations with respect to Economic Activity and Job Creation for a Successor Entity since it set forth in the Agreement, but to be clear and remove any ambiguity our legal has revised the document to specifically identify those obligations in Section VII. Hopefully this is an acceptable compromise on the issue.

>>

>> If this does not answer the mail, then we should get on the phone on Monday to address. I will be on business travel in Seattle beginning Monday. We could probably do a later afternoon your time if needed, but at the latest Tuesday. I hopeful that is not necessary, but please advise.

>>

>> Thank you,

>>

>> Eric

>>

>>

>> -----Original Message-----

>> From: Rick Loessberg [mailto:Rick.Loessberg@dallascounty.org]

>> Sent: Friday, March 27, 2015 2:28 PM

>> To: Murray, Eric

>> Subject: RE: Dallas County Application - Confidential Information

>>

>> As I've said before, we recognize that the wording in this section is different than that in the Coppell agreement. This language must be different because the nature/scope of the Dallas and Coppell projects are vastly different as are their locations.

>>

>>

>> We must have some type of language in place to make sure that the economic activity created by any successor entity is consistent with the County's abatement policy. I'm open to any creative solution, but I don't see how the proposed wording from the attorney protects the County any better. Maybe if someone can explain why this is so critical from Amazon's perspective that will help. At present, the only options I see are: (1) using the wording that I've proposed, or (2) requiring that all assignments must be reviewed by the Commissioners Court to ensure policy compliance.

>>

>> Thanks for your help in navigating this.

>>

>> From: Murray, Eric [REDACTED]

>> Sent: Friday, March 27, 2015 12:16 PM

>> To: Rick Loessberg

>> Subject: RE: Dallas County Application - Confidential Information

>>

>> Rick

>>

>> Here is a response from our attorney regarding the Assignment language:

>>

>> "The added assignment language by the County is not consistent with the DFW6 (Coppell) agreement which permitted broader assignment without a reference to the applicable Court Order. My preference is to keep it out. I think the County is better protected in this way. The assignment language only permits assignment to a Successor Entity who in any event must comply with the terms of the Tax Abatement Agreement"

>>

>> How can we get there?

>>

>> Thanks

>>

>> Eric

>> From: Rick Loessberg [mailto:Rick.Loessberg@dallascounty.org]

>> Sent: Tuesday, March 24, 2015 7:10 PM

>> To: Murray, Eric

>> Subject: Re: Dallas County Application - Confidential Information

>>

>> As I mentioned yesterday, I'm out of the office most of tomorrow so I'm not sure if I can get this onto the agenda. I will try though.

>>

Rick Loessberg

From: Rick Loessberg
Sent: Monday, March 30, 2015 7:30 AM
To: 'Murray, Eric'
Subject: RE: Dallas County Application - Confidential Information

I really appreciate you trying to get this resolved. The latest revision is a lot closer, but still not there because the job generation requirement does not overtly say that jobs can't be moved from another Dallas County location. That's why I wanted to have the reference to the economic activity having to be in compliance with the County's abatement policy (court order 2015-0054).

Perhaps we should have a phone call with everyone. I should generally be around all day. My cell is [REDACTED]

Thanks.

-----Original Message-----

From: Murray, Eric [mailto:[REDACTED]]
Sent: Friday, March 27, 2015 8:39 PM
To: Rick Loessberg
Subject: RE: Dallas County Application - Confidential Information

Rick

Working OT on this one to try and wrap it up. We have accepted all prior changes so that only the recent proposed change by our attorney to Section VII is highlighted in the attached.

For context, we do not believe it is necessary to look to the Court Order to confirm our obligations with respect to Economic Activity and Job Creation for a Successor Entity since it set forth in the Agreement, but to be clear and remove any ambiguity our legal has revised the document to specifically identify those obligations in Section VII. Hopefully this is an acceptable compromise on the issue.

If this does not answer the mail, then we should get on the phone on Monday to address. I will be on business travel in Seattle beginning Monday. We could probably do a later afternoon your time if needed, but at the latest Tuesday. I hope that is not necessary, but please advise.

Thank you,

Eric

-----Original Message-----

From: Rick Loessberg [mailto:Rick.Loessberg@dallascounty.org]
Sent: Friday, March 27, 2015 2:28 PM
To: Murray, Eric
Subject: RE: Dallas County Application - Confidential Information

As I've said before, we recognize that the wording in this section is different than that in the Coppell agreement. This language must be different because the nature/scope of the Dallas and Coppell projects are vastly different as are their

locations.

We must have some type of language in place to make sure that the economic activity created by any successor entity is consistent with the County's abatement policy. I'm open to any creative solution, but I don't see how the proposed wording from the attorney protects the County any better. Maybe if someone can explain why this is so critical from Amazon's perspective that will help. At present, the only options I see are: (1) using the wording that I've proposed, or (2) requiring that all assignments must be reviewed by the Commissioners Court to ensure policy compliance.

Thanks for your help in navigating this.

From: Murray, Eric [REDACTED]
Sent: Friday, March 27, 2015 12:16 PM
To: Rick Loessberg
Subject: RE: Dallas County Application - Confidential Information

Rick

Here is a response from our attorney regarding the Assignment language:

"The added assignment language by the County is not consistent with the DFW6 (Coppell) agreement which permitted broader assignment without a reference to the applicable Court Order. My preference is to keep it out. I think the County is better protected in this way. The assignment language only permits assignment to a Successor Entity who in any event must comply with the terms of the Tax Abatement Agreement"

How can we get there?

Thanks

Eric
From: Rick Loessberg [mailto:Rick.Loessberg@dallascounty.org]
Sent: Tuesday, March 24, 2015 7:10 PM
To: Murray, Eric
Subject: Re: Dallas County Application - Confidential Information

As I mentioned yesterday, I'm out of the office most of tomorrow so I'm not sure if I can get this onto the agenda. I will try though.

Sent from my iPhone

On Mar 24, 2015, at 4:09 PM, "Murray, Eric" <[REDACTED]>> wrote:
Let me run this by our team and hope to have a response be before noon tomorrow!

On Mar 24, 2015, at 3:21 PM, Rick Loessberg
<Rick.Loessberg@dallascounty.org<mailto:Rick.Loessberg@dallascounty.org>> wrote:
Civil Section is ok with "reasonable" being inserted in indemnification section.

Thanks for catching the "without". As to why I don't want to use the Coppell language, as I mentioned in an earlier email, I want to make sure that any successor entity meets the County's tax abatement policy (in particular, we don't provide incentives for someone to move from one Dallas County city to another). There was very little likelihood that someone else would be able to step in and maintain a \$100 million increase in the assessed valuation at the Coppell facility. However, there is a strong possibility that someone in the future could utilize the new Dallas site and provide for a \$20 million increase by moving from another County city to this site.

From: Murray, Eric [mailto: [REDACTED]]
Sent: Tuesday, March 24, 2015 1:38 PM
To: Rick Loessberg
Cc: Lee Higgins
Subject: Re: Dallas County Application - Confidential Information

Actually it says "without prior approval"

Like you, trying to close this by tomorrow to get on the 3/31 docket

On Mar 24, 2015, at 2:34 PM, Murray, Eric < [REDACTED] > wrote:
Rick

I pulled up the Assignment Language from the deal in Coppell and the language struck below was previously accepted by the County?

Why is it not acceptable for this agreement as well?

Eric Murray
Sr. Mgr. Economic Development
Amazon.com<http://Amazon.com>
601 New Jersey Ave. NW
Suite 900
Washington, DC 20001
202-763-5024
[REDACTED]

On Mar 24, 2015, at 1:29 PM, Murray, Eric < [REDACTED] > wrote:
Rick

I will wait to hear from you re: attorney's fees and then send everything at once to our legal.

Eric Murray
Sr. Mgr. Economic Development
Amazon.com<http://Amazon.com>
601 New Jersey Ave. NW
Suite 900
Washington, DC 20001

On Mar 24, 2015, at 12:30 PM, Rick Loessberg
<Rick.Loessberg@dallascounty.org<mailto:Rick.Loessberg@dallascounty.org>> wrote:
Have asked our Civil Section about the proposed insertion of the word "reasonable" in the indemnification section-
nothing back yet.

The proposed wording to the assignment section (VII) isn't quite there. Let me propose an alternative:

The terms and conditions of this Agreement are binding upon the successors and assigns of all parties hereto. The Owner may assign its rights and responsibilities under this Agreement, including the right to receive the Tax Abatement, with the prior approval of the Commissioners Court, as long as the Successor Entity's Economic Activity and its fulfillment of the Agreement's Job Generation Requirement is consistent with Court Order 2015-0054.

Thanks.

From: Murray, Eric [mailto:]
Sent: Monday, March 23, 2015 8:10 AM
To: Rick Loessberg
Cc: Lee Higgins
Subject: RE: Dallas County Application - Confidential Information

Rick

Hot off the Press!

Let me know if the attached edits are acceptable.

Thank you,

Eric

From: Rick Loessberg [mailto:Rick.Loessberg@dallascounty.org]<mailto:[mailto:Rick.Loessberg@dallascounty.org]>
Sent: Monday, March 23, 2015 8:54 AM
To: Murray, Eric
Subject: RE: Dallas County Application - Confidential Information

Any news? I am physically not going to be in the office much Wednesday so I would like to be able to wrap this up tomorrow if we can.

Thanks for all of your help.

From: Murray, Eric [mailto:]
Sent: Wednesday, March 18, 2015 1:32 PM
To: Rick Loessberg
Subject: RE: Dallas County Application - Confidential Information

I just heard back and we will try but given the hour of the day we will likely be looking at the 31st.

Thanks for your support and patience

From: Rick Loessberg [mailto:Rick.Loessberg@dallascounty.org]<mailto:[mailto:Rick.Loessberg@dallascounty.org]>

Sent: Wednesday, March 18, 2015 2:20 PM

To: Murray, Eric

Subject: RE: Dallas County Application - Confidential Information

Yes. Also, the 31st would be the next agenda date.

From: Murray, Eric [mailto:████████████████████]

Sent: Wednesday, March 18, 2015 1:16 PM

To: Rick Loessberg

Subject: RE: Dallas County Application - Confidential Information

Is that 3 central time?

From: Rick Loessberg [mailto:Rick.Loessberg@dallascounty.org]<mailto:[mailto:Rick.Loessberg@dallascounty.org]>

Sent: Wednesday, March 18, 2015 2:13 PM

To: Murray, Eric

Subject: RE: Dallas County Application - Confidential Information

I wish I could wait until 4:00 or 5:00, but I can't-I need signatures from our reviewing attorney, and I have to enter a copy of the agreement into our electronic agenda system by 2:00 p.m. I could maybe push it to 3:00, but if the attorney isn't available, then we're stuck. Sorry.

From: Murray, Eric [mailto:████████████████████]

Sent: Wednesday, March 18, 2015 12:55 PM

To: Rick Loessberg

Subject: RE: Dallas County Application - Confidential Information

My apologies.

I have been pushing.

Can we have until COB?

If we cannot close today, would it be the 31st?

From: Rick Loessberg [mailto:Rick.Loessberg@dallascounty.org]<mailto:[mailto:Rick.Loessberg@dallascounty.org]>

Sent: Wednesday, March 18, 2015 1:52 PM

To: Murray, Eric

Subject: RE: Dallas County Application - Confidential Information

Any word yet? If we're going to move forward for the 24th, I'm going to need to know within the next hour or so.

Thanks for your help with this.

From: Murray, Eric [mailto:████████████████████]

Sent: Tuesday, March 17, 2015 1:04 PM

To: Rick Loessberg

Cc: Lee Higgins

Subject: RE: Dallas County Application - Confidential Information

Outstanding!

I hope to hear back from our legal today.

Thank you,

From: Rick Loessberg [mailto:Rick.Loessberg@dallascounty.org]<mailto:[mailto:Rick.Loessberg@dallascounty.org]>
Sent: Tuesday, March 17, 2015 1:56 PM
To: Murray, Eric
Subject: RE: Dallas County Application - Confidential Information

No questions during briefing. On to next week's formal agenda.

From: Murray, Eric [mailto: [REDACTED]]
Sent: Tuesday, March 17, 2015 6:31 AM
To: Rick Loessberg
Cc: Lee Higgins
Subject: RE: Dallas County Application - Confidential Information
Importance: High

Rick

* Can you provide a form of Exemption Application that will need to be filed each year? If not, what information is required to be submitted?

* We are providing a final write-up to Senior Management regarding the entire Agreement and we are reviewing the language providing the County the right to inspect the Premises. Just as a FYI, has the County ever exercised its right to inspect our Coppell location? To my knowledge "no", but just wanted to check.

* Please confirm is acceptable re: Assignment: "We can agree to obtaining prior approval for an assignment to a third party but consistent with Coppell need to maintain the right to assign to a Successor Entity"

Pushing hard to wrap this up today. Let me know the outcome of the vote.

Thank you,

Eric

From: Murray, Eric
Sent: Monday, March 16, 2015 5:14 PM
To: 'Rick Loessberg'
Cc: Lee Higgins
Subject: FW: Dallas County Application - Confidential Information
Importance: High

Rick

See our Attorney's comments below.

Eric

From: Rick Loessberg [mailto:Rick.Loessberg@dallascounty.org]
Sent: Friday, March 13, 2015 1:54 PM
To: Murray, Eric
Cc: Lee Higgins
Subject: RE: Dallas County Application - Confidential Information

Comments look good with just a couple of exceptions:

- * Section VI, 1(i): looks like (at least to me) that "allows its" should not have been struck out. [AMZN restore in the next draft.]
- * Section XVI: Proposed wording may not appear to be that substantial, but our Civil Section always insists that the language in this section be accepted as is. [For purposes of approvals, it will be helpful if the County could provide the Civil Section cite so that we may confirm.]

Timing of execution: If you would like to execute the lease first, it might be better to hold-off on the formal approval until that is done-we typically don't formally approve an abatement without the associated agreement being attached to the authorizing court order. Also, if this would help, we could still approve the abatement and execute our part on March 24 and Amazon could then sign it whenever it wanted. Just tell what works-I'll need to know by March 18 at noon if I'm to place something on the March 24 formal agenda. [County sign first on 3/24 and then AMZN will sign concurrently with the Lease.]

Court Order 2015-0054 and 2015-____: The first citation (2015-0054) references the County's current tax abatement policy. The second citation (2015-____) will reference the number of the court order that formally approves the abatement for this project. The blank will be filled in when the order has been approved and a number has been assigned to it. [Can we get a copy of 2015-0054?]

Thanks for your help with this. Please let me know if you have any other questions.

From: Murray, Eric [mailto:████████████████████]
Sent: Friday, March 13, 2015 12:33 PM
To: Rick Loessberg
Cc: Lee Higgins
Subject: RE: Dallas County Application - Confidential Information
Importance: High

Rich

Attached please find our comments to the Agreement. Is it possible to hold the agreement for signature following the vote on 3/24 until our lease execution which is expected by the end of the month?

Also, please clarify the reference to "Court Order 2015-0054 and 2015-____",

Let me know if you have any questions.

Eric Murray
Senior Manager Economic Development

Amazon
601 New Jersey Ave. NW
Suite 900
Washington, DC 20001
202-763-5024
[REDACTED]

From: Rick Loessberg [mailto:Rick.Loessberg@dallascounty.org]<mailto:[mailto:Rick.Loessberg@dallascounty.org]>
Sent: Monday, March 09, 2015 8:25 AM
To: Murray, Eric
Subject: RE: Dallas County Application - Confidential Information

I think I have everything for the 3/17 briefing.

What I need by 3/18 are any comments from your attorneys and the resolution of said comments; that information will enable us to go forward on 3/24 for final approval.

From: Murray, Eric [mailto:[REDACTED]]
Sent: Monday, March 09, 2015 7:21 AM
To: Rick Loessberg
Cc: Lee Higgins
Subject: RE: Dallas County Application - Confidential Information

Rick

Hope all is well. I am waiting on a response from our legal team, but want to clarify the note below re: having things worked out by noon on 3/18.

What is needed for next Tuesday's vote on 3/17, what is needed by noon on 3/18 and what is needed by 3/24 for the final approvals?

Thank you,

Eric

From: Lee Higgins
[mailto:[REDACTED]]
Sent: Wednesday, March 04, 2015 4:03 PM
To: Rick Loessberg; Murray, Eric
Subject: Re: Dallas County Application - Confidential Information

Thanks for the quick turnaround Rick

Lee Higgins
Principal
Tax Incentives Consultants, LLC
100 Congress Ave., Ste. 2000

Austin, TX 78701

(512) 963-3701

From: Rick Loessberg <Rick.Loessberg@dallascounty.org<mailto:Rick.Loessberg@dallascounty.org>>
Date: Wednesday, March 4, 2015 at 2:51 PM
To: "Murray, Eric" <[REDACTED]>
Cc: Lee Higgins <[REDACTED]>
Subject: RE: Dallas County Application - Confidential Information

Thanks again for all of your help on Monday as well as for the information that you provided yesterday-I think I have everything that I need to prepare an item for the Commissioners Court's March 17 briefing agenda.

I have also attached a draft of a proposed tax abatement agreement for this project. It is generally identical to the agreement that was used for Amazon's Coppell, Texas facility in 2012 and includes the same contact people in Section VII-the only material differences are that this new version has a job creation requirement and the sliding scale abatement that we talked about earlier.

Please look at it and let me know if there are any corrections, questions, or needed updates. For us to be able to formally approve the abatement and execute an agreement, we will need to have everything worked out by noon on March 18. Please also note that we will need a legal description for the property that Amazon will occupy.

I am also forwarding this draft to our legal department to review as well. Since it is based on a format that that office has previously approved, I'm hoping that there will be no comments other than stylistic.

From: Murray, Eric [mailto:[REDACTED]]
Sent: Tuesday, March 03, 2015 6:41 PM
To: Rick Loessberg
Cc: Lee Higgins
Subject: Dallas County Application - Confidential Information
Importance: High

Rick

It was a pleasure to speak with you yesterday regarding the opportunity in Dallas County. Attached please find our application for review and consideration with regards to a personal property tax abatement.

Please forward a draft Agreement at your convenience as we have our attorney ready to review to keep the project on schedule for 3/17 and 3/24.

We look forward to working with you.

Best regards,

Eric Murray
Senior Manager Economic Development
Amazon.com<<http://Amazon.com>>
601 New Jersey Ave. NW
Suite 900
Washington, DC 20001
202-763-5024

Rick Loessberg

From: Murray, Eric <[REDACTED]>
Sent: Thursday, March 05, 2015 8:28 AM
To: Rick Loessberg
Cc: Lee Higgins
Subject: Agreement Documentation - Confidential
Attachments: 2- V401-FP01-29955.pdf; 3- V401-FP02-29955.pdf; JJ Lemmon parcel ID AcctDetailCom.pdf

Rick

Does this work for the Agreement?

Eric Murray
Senior Manager Economic Development
Amazon
601 New Jersey Ave. NW
Suite 900
Washington, DC 20001
202-763-5024
[REDACTED]

Eric

The final plat will not be recorded until all the improvements are complete .

The Final plat submittal to the City of Dallas the Bldg 2 tract will be know as Block B/8264 Lot 1. See attached Final Plat submittal document.

BLOCK B/8264,
LOT 1
79.24 AC.



Commercial Account #0000800857000000

Location Owner Legal Desc Value Improvements Land Exemptions Estimated Taxes Building Footprint History

Location (Current 2015)

Address: 4800 LBJ FWY
Market Area: 0
Mapsc0: 67-W (DALLAS)

[DCAD Property Map](#)

[View Photo](#)

[2014 Appraisal Notice](#)

[Electronic Documents \(ENS\)](#)



[Print Homestead Exemption Form](#)

[YAHOO! Maps](#)

Owner (Current 2015)

LIT RPC JJ LEMMON INDUSTRIAL LLC
1717 MCKINNEY AVE STE 1900
DALLAS, TEXAS 752021253

Multi-Owner (Current 2015)

Owner Name	Ownership %
LIT RPC JJ LEMMON INDUSTRIAL LLC	100%

Legal Desc (Current 2015)

- 1: BLK 8264
 - 2: TR 2 ACS 96.6256
 - 3: ALSO LOC BLK 8266
 - 4: INT201400194594 DD07312014 CO-DC
 - 5: 8264 000 00200 2DA8264 000
- Deed Transfer Date: 8/1/2014

Value

2014 Certified Values	
Improvement:	\$0
Land:	+ \$946,940
Market Value:	=\$946,940
Revaluation Year:	2014
Previous Revaluation Year:	2012

Improvements (Current 2015)

No Improvements.

Rick Loessberg

From: Rick Loessberg
Sent: Wednesday, November 16, 2016 11:29 AM
To: Sarles, Elizabeth (SarlesE@DCAD.org)
Subject: FW: Clarifying Amazon BPP Tax Abatement Agreement

FYI

From: Myers, William [mailto:████████████████████]
Sent: Wednesday, November 16, 2016 11:28 AM
To: Rick Loessberg
Subject: RE: Clarifying Amazon BPP Tax Abatement Agreement

I really appreciate you looking into this. I'll make a note of these requirements with my colleagues so we can make the 2017 deadline.

Have a great week,

William

From: Rick Loessberg [mailto:Rick.Loessberg@dallascounty.org]
Sent: Wednesday, November 16, 2016 5:33 AM
To: Myers, William <████████████████████>
Subject: RE: Clarifying Amazon BPP Tax Abatement Agreement

DCAD has told me that it is too late to file for 2016. Fortunately, as I've mentioned previously, the abatement for this project can still go into effect for 2017. If I receive the employment verification letter by 1/31/2017 and DCAD gets the abatement application by 4/30/2017, then the process should automatically take it from there.

Please let me know if you need anything else.

From: Myers, William [mailto:████████████████████]
Sent: Tuesday, November 15, 2016 11:50 AM
To: Rick Loessberg
Subject: RE: Clarifying Amazon BPP Tax Abatement Agreement

That is extremely helpful- we look forward to hearing the outcome of your conversation.

Thank you,

William

From: Rick Loessberg [mailto:Rick.Loessberg@dallascounty.org]
Sent: Tuesday, November 15, 2016 5:10 AM
To: Myers, William <████████████████████>
Subject: RE: Clarifying Amazon BPP Tax Abatement Agreement

Per the abatement agreement, there are two items that must be submitted every year: the employment certification letter (which is submitted to me and which was done in February) and an application (a copy of which is attached) that

must be submitted to the Dallas Central Appraisal District (and which apparently has not been done). These requirements are identical to what is in place for Amazon's other Dallas County abatement (at 900/940 W. Bethel in Coppell) which went into effect several years ago.

I have a phone call in to DCAD as to whether the abatement can be granted at this very late date. If it cannot, the abatement for 33333 LBJ was structured so that it can still go into effect next year (which means the annual certification later and annual DCAD submission must be made in February-March of 2017) so Amazon will still have the ability to start the clock for this 10-year abatement—it will just start one year later than it might have desired.

Hope this helps. I'll let you know what I hear from DCAD.

From: Myers, William [mailto: [REDACTED]]
Sent: Monday, November 14, 2016 5:58 PM
To: Rick Loessberg
Subject: RE: Clarifying Amazon BPP Tax Abatement Agreement

Thanks for looking into this. My colleague Astra Holder sent the letter to you over email (attached) on February 1st—does that meet the requirements? Please let me know if so or if there's any alternative approaches we can take at this point to reflect this for the current year.

From: Rick Loessberg [mailto:Rick.Loessberg@dallascounty.org]
Sent: Saturday, November 12, 2016 5:22 AM
To: Myers, William < [REDACTED] >
Subject: Re: Clarifying Amazon BPP Tax Abatement Agreement

Did they ever submit the abatement application to DCAD? If they did and the tax statement wasn't done correctly, that will be easier to address than if it wasn't ever submitted.

On Nov 11, 2016, at 7:23 PM, Myers, William < [REDACTED] > wrote:

Hi Rick,

Thanks again for taking the time to speak with me earlier this week. I spoke with my tax colleagues and they noted that we provided the attached certification of full time positions and average salary on 2 February 2016, but the 2016 tax bill they received does not reflect the 75% abatement (attached). Would it be possible for your colleagues to reissue the 2016 statement please?

Have a wonderful weekend,

William

William Myers | Economic Development Compliance Analyst | Amazon
[REDACTED] | O: +1 206 788 1333 | M: +1 516 439 8916

From: Myers, William
Sent: Thursday, November 10, 2016 9:56 AM
To: 'Rick.Loessberg@dallascounty.org' <Rick.Loessberg@dallascounty.org>
Subject: Clarifying Amazon BPP Tax Abatement Agreement

Dear Mr. Loessberg,

I hope your week is going well. I'm on Amazon's Economic Development team working with Astra Holder and Mike Grella. I was wondering if I might be able to speak with you today to get your guidance on our Business Personal Property Tax Abatement Agreement. Our team is looking to clarify if the 75% abatement for our Dallas FTW1 facility goes into effect for the 2016 tax year or if it does not go into effect until 2017?

Thanks so much for your help.

Kind Regards,

William

William Myers | Economic Development Compliance Analyst | Amazon

[REDACTED] | O: +1 206 788 1333 | M: +1 516 439 8916

<FTW1 - 2016 BPP Tax Abatement Annual Certification of Employees and Wage....pdf>

<101416 2016 FTW1 Dallas Tax Statement.pdf>

Rick Loessberg

From: Rick Loessberg
Sent: Tuesday, November 15, 2016 9:13 AM
To: Sarles, Elizabeth
Subject: Re: Is is too late to claim an abatement?

Understood. Thanks.

On Nov 15, 2016, at 9:06 AM, Sarles, Elizabeth <SarlesE@DCAD.org> wrote:

Greetings!

Sorry, for the delay, I was in New York. Yes, I have spoken to Fluor people. Apparently, they dropped the ball and did not submit the application. The tax code allows 60 days for good cause, but they did not contact us until after the 60 days. So, at this point we cannot approve it. But, we'll see..

Thanks,
Elizabeth

From: Rick Loessberg [<mailto:Rick.Loessberg@dallascounty.org>]
Sent: Monday, November 14, 2016 1:19 PM
To: Sarles, Elizabeth
Subject: Is is too late to claim an abatement?

Left a phone message for you, but decided to try this route in case it was easier.

In the last couple of days, I've had two requests from firms (Amazon and Fluor) that apparently did not submit their abatement application in March like they were supposed to. They are now wondering if it is too late to do so. Both should have known better: Fluor is in the tenth year of its abatement, and this is the second active abatement that Amazon has had with us.

If it's too late to have them submit and/or if you have already told others no, that's ok with us. At least for Amazon, they can start their abatement the next year if it's too late this year. Fluor will just be out of luck.

Just let me know what works for you guys, and I will pass that along.

Rick Loessberg

From: Myers, William <[REDACTED]>
Sent: Thursday, November 10, 2016 11:59 AM
To: Rick Loessberg
Subject: Clarifying Amazon BPP Tax Abatement Agreement

Dear Mr. Loessberg,

I hope your week is going well. I'm on Amazon's Economic Development team working with Astra Holder and Mike Grella. I was wondering if I might be able to speak with you today to get your guidance on our Business Personal Property Tax Abatement Agreement. Our team is looking to clarify if the 75% abatement for our Dallas FTW1 facility goes into effect for the 2016 tax year or if it does not go into effect until 2017?

Thanks so much for your help.

Kind Regards,

William

William Myers | Economic Development Compliance Analyst | Amazon

[REDACTED] O: +1 206 788 1333 | M: +1 516 439 8916

11/10/2016

told him that Amazon had choice of starting as of either the 1/1/2016 assessment (assuming it met all of the triggering reqmts) or the upcoming 1/1/2017 assessment. however, Deadline for submitting application to DCAO for 1/1/2016 has passed / 2016 tax roll has been certified so trying to start it on 1/1/2017 is probably now the better option