



Chapter 313 Annual Eligibility Report Form

SECTION 1: Applicant and District Information

- Tax year covered by this report: 2013
NOTE: This report must be completed and submitted to the school district by May 15 of every year using information from the previous tax (calendar) year.
- Application number: 133
NOTE: You can find your application number and all agreement documents and reports on the website www.texasahead.org/tax_programs/chapter313/applicants
- Name of school district: Waller
- Name of project on original application (or short description of facility): Houston West - 28401 Betka Road Hockley, TX
- Name of applicant on original application: _____
- Name the company entering into original agreement with district: Hewlett-Packard Company
- Amount of limitation at time of application approval: \$10,000,000
- If you are one of two or more companies originally applying for a limitation, list all other applicants here and describe their relationships. (Use attachments if necessary.)

SECTION 2: Current Agreement Information

- Name of current agreement holder(s) Hewlett-Packard Company
- Complete mailing address of current agreement holder Attn: Prop Tax P O Box 251209 Plano, TX 75025-1209
- Company contact person for agreement holder:

<u>Michele Hodges</u>	<u>US Property Tax Manager</u>
Name	Title
<u>470-212-9475</u>	<u>michele.hodges@hp.com</u>
Phone	Email
- Texas franchise tax ID number of current agreement holder: 19410814362
- If the current agreement holder does not report under the franchise tax law, please include name and tax ID of reporting entity:
N/A

Name _____ Tax ID _____

- If the authorized company representative (same as signatory for this form) is different from the contact person listed above, complete the following:

Name _____	Title _____
Complete Mailing Address _____	
Phone _____	Email _____

- If you are a current agreement holder who was not an original applicant, please list all other current agreement holders. Please describe the chain of ownership from the original applicant to the new entities. (Use attachments if necessary.)

SECTION 3: Applicant Eligibility Information

1. Does the business entity have the right to transact business with respect to Tax Code, Chapter 171? *(Attach printout from Comptroller Web site: <http://www.window.state.tx.us/taxinfo/coasintr.html>)* Yes No
 2. Is the business entity current on all taxes due to the State of Texas? Yes No
 3. Is the business activity of the project an eligible business activity under Section 313.024(b)? Yes No
- 3a. Please identify business activity: (2) Research & Development

SECTION 4: Qualified Property Information

1. Market value for reporting year: \$ 114,368,073.00
2. I&S taxable value for reporting year: \$ 114,368,073.00
3. M&O taxable value for reporting year: \$ 10,000,000.00

SECTION 5A: Wage and Employment Information for Applications Prior to Jan. 1, 2014 (#1 Through 999)

ONLY COMPLETE THE WAGE SECTION (5A or 5B) THAT APPLIES TO YOUR APPLICATION. You can find your application number on the website at www.texasahead.org/tax_programs/chapter313/applicants.

NOTE: All statutory references in Section 5A are for statute as it existed prior to Jan. 1, 2014. For job definitions see TAC §9.1051(14) and Tax Code, §313.021(3). If the agreement includes a definition of "new job" other than TAC §9.1051(14)(C), then please provide the definition "new job" as used in the agreement. Notwithstanding any waiver by the district of the requirement for the creation of a minimum number of new jobs, or any other job commitment in the agreement, Tax Code §313.024(d) requires that 80 percent of all new jobs be qualifying jobs.

1. How many new jobs were based on the qualified property in the year covered by this report? *(See note above)* _____
2. What is the number of new jobs required for a project in this school district according to §313.021(2)(A)(iv)(b), §313.051(b), as appropriate? _____
3. Did the applicant request that the governing body waive the minimum job requirement, as provided under Tax Code §313.025(f-1)? Yes No
 - 3a. If yes, how many new jobs must the approved applicant create under the waiver? _____
4. Calculate 80 percent of new jobs (0.80 x number of new jobs based on the qualified property in the year covered by this report.) _____
5. What is the minimum required annual wage for each qualifying job in the year covered by the report? \$ 68,350.00
6. Identify which of the four Tax Code sections is used to determine the wage standard required by the agreement:
 - §313.021(5)(A) or §313.021(5)(B) or §313.021(3)(E)(ii) or §313.051(b)
 - 6a. Attach calculations and cite exact Texas Workforce Commission data source as defined in TAC §9.1051.
7. Does the agreement require the applicant to provide a specified number of jobs at a specified wage? Yes No
 - 7a. If yes, how many qualifying jobs did the approved applicant commit to create in the year covered by the report? _____
 - 7b. If yes, what annual wage did the approved applicant commit to pay in the year covered by the report? \$ _____
 - 7c. If yes, how many qualifying jobs were created at the specified wage in the year covered by the report? _____
8. How many qualifying jobs (employees of this entity and employees of a contractor with this entity) were based on the qualified property in the year covered by the report? _____
 - 8a. Of the qualifying job-holders last year, how many were employees of the approved applicant? _____
 - 8b. Of the qualifying job-holders last year, how many were employees of an entity contracting with the approved applicant? _____
 - 8c. If any qualifying job-holders were employees of an entity contracting with the applicant, does the approved applicant or assignee have documentation from the contractor supporting the conclusion that those jobs are qualifying jobs? Yes No N/A

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SECTION 5B: Wage and Employment Information for Applications After Jan. 1, 2014 (#1000 and Above)

ONLY COMPLETE THE WAGE SECTION (5A or 5B) THAT APPLIES TO YOUR APPLICATION. You can find your application number on the website at www.texasahead.org/tax_programs/chapter313/applicants.

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

QUALIFYING JOBS

1. What is the number of new qualifying jobs the applicant committed to create in the year covered by this report? _____
2. Did the applicant request that the governing body waive the minimum qualifying job requirement, as provided under Tax Code §313.025(f-1)? Yes No
 - 2a. If yes, how many new qualifying jobs must the approved applicant create under the waiver? _____
3. Which Tax Code section are you using to determine the wage standard required for this project? §313.021(5)(A) or §313.021(5)(B)
 - 3a. Attach calculations and cite exact Texas Workforce Commission data sources as defined in TAC §9.1051.
4. What is the minimum required annual wage for each qualifying job in the year covered by this report? \$ _____
5. What is the annual wage the applicant committed to pay for each of the qualifying jobs in the year covered by this report? \$ _____
6. Do the qualifying jobs meet all minimum requirements set out in Tax Code §313.021(3)? Yes No

NON-QUALIFYING JOBS

7. What is the number of non-qualifying jobs the applicant had on Dec. 31 of the year covered by this report? _____
8. What was the average wage you were paying for non-qualifying jobs on Dec. 31 of the year covered by this report? .. \$ _____
9. What is the county average weekly wage for non-qualifying jobs, as defined in TAC §9.1051? \$ _____

MISCELLANEOUS

10. Did the applicant rely on a determination by the Texas Workforce Commission under the provisions §313.024(3)(F) in meeting the minimum qualifying job requirements? Yes No
 - 10a. If yes, attach supporting documentation to evidence that the requirements of §313.021(3)(F) were met.
11. Are you part of a Single Unified Project (SUP) and relying on the provisions in Tax Code §313.024(d-2) to meet the qualifying job requirements? Yes No
 - 11a. If yes, attach supporting documentation from the Texas Economic Development and Tourism Office including a list of the other school district(s) and the qualifying jobs located in each.

SECTION 6: Qualified Investment During Qualified Time Period

ENTITIES ARE NOT REQUIRED TO COMPLETE THIS SECTION IF THE YEAR COVERED BY THE REPORT IS AFTER THE QUALIFYING TIME PERIOD OF THEIR AGREEMENT.

1. What is the qualified investment expended by this entity from the beginning of the qualifying time period through the end of the year covered by this report? \$ _____
2. Was any of the land classified as qualified investment? Yes No
3. Was any of the qualified Investment leased under a capitalized lease? Yes No
4. Was any of the qualified Investment leased under an operating lease? Yes No
5. Was any property not owned by the applicant part of the qualified investment? Yes No

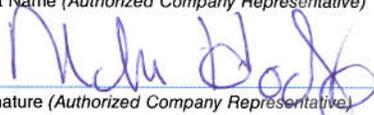
SECTION 7: Partial Interest

THE FOLLOWING QUESTIONS MUST BE ANSWERED BY ENTITIES HAVING A PARTIAL INTEREST IN AN AGREEMENT. For limitation agreements where there are multiple company entities that receive a part of the limitation provided by the agreement: 1) each business entity not having a full interest in the agreement should complete a separate form for their proportionate share of required employment and investment information; and, 2) separately, the school district is required to complete an Annual Eligibility Report that provides for each question in this form a sum of the individual answers from reports submitted by each entity so that there is a cumulative Annual Eligibility Report reflecting the entire agreement.

1. What was your limitation amount (or portion of original limitation amount) during the year covered by this report? _____
2. Please describe your interest in the agreement and identify all the documents creating that interest.

SECTION 8: Approval

"I am the authorized representative for the Company submitting this Annual Eligibility Report. I understand that this Report is a government record as defined in Chapter 37 of the Texas Penal Code. The information I am providing on this Report is true and correct to the best of my knowledge and belief."

print here ▶	Michele Hodges <small>Print Name (Authorized Company Representative)</small>	U S Property Tax Manager <small>Title</small>
sign here ▶	 <small>Signature (Authorized Company Representative)</small>	06/13/2014 <small>Date</small>
print here ▶	Michele Hodges <small>Print Name of Preparer (Person Who Completed the Form)</small>	470-212-9475 <small>Phone</small>



Franchise Tax Account Status

As of: 06/10/2014 02:31:06 PM

This Page is Not Sufficient for Filings with the Secretary of State

HEWLETT-PACKARD COMPANY	
Texas Taxpayer Number	19410814362
Mailing Address	5400 LEGACY DR # H14A66 PLANO, TX 75024-3105
Right to Transact Business in Texas	ACTIVE
State of Formation	DE
Effective SOS Registration Date	05/05/1998
Texas SOS File Number	0012093906
Registered Agent Name	CT CORPORATION SYSTEM
Registered Office Street Address	1999 BRYAN ST., STE. 900 DALLAS, TX 75201

Hewlett-Packard Company
Chapter 313 ISD Limitation Agreements
Calculation of Qualified Annual Wage Measurement

15555 Cutten Road - Houston	
Harris County	Klein ISD
Application Date:	15-May-06
<u>4 previous qtrs</u>	<u>Weekly MFG wages</u>
1st Qtr 2006	\$1,395
2nd Qtr 2005	\$1,141
3rd Qtr 2005	\$1,192
4th Qtr 2005	\$1,257
	\$4,985
	Divided by 4 qtrs
Weekly Avg	\$1,246
x 50 weeks	\$62,300
x 110%	\$68,530

Quarterly Employment and Wages (QCEW)

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Year	Period	Area	Ownership	Division	Level	Ind Code	Industry	Avg Weekly Wages
2003	1st Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,009
2003	2nd Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,051
2003	3rd Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,011
2003	4th Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,106
2004	1st Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,221
2004	2nd Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,075
2004	3rd Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,073
2004	4th Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,132
2004	1st Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,270
2005	2nd Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,161
2005	3rd Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,192
2005	4th Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,257
2006	1st Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,200
2006	2nd Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,202
2006	3rd Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,192
2006	4th Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,395
2007	1st Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,403
2007	2nd Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,200
2007	3rd Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,205
2007	4th Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,519
2008	1st Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,479
2008	2nd Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,271
2008	3rd Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,299
2008	4th Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,515
2009	1st Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,399
2009	2nd Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,255
2009	3rd Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,270
2009	4th Qtr	Harris County	Private	31	2	31-33	Manufacturing	\$1,494

Mali Hanley

From: Hodges, Michele (HP Tax) <michele.hodges@hp.com>
Sent: Monday, June 16, 2014 3:48 PM
To: Mali Hanley
Cc: bpopinski@moakcasey.com
Subject: Hewlett Packard Company - Chapter 313 Reporting
Attachments: HPC_CHPT313.ZIP

Attached are Forms 50-772A and 50-773A (both pdf and excel version) for Austin ISD, Klein ISD, Waller ISD and Round Rock ISD. Per my phone conversation with Mali, I am still waiting on some last minute information from HR regarding the headcount and wage information, as well as cumulative spend. I am submitting the forms with the information that I do have as of now and will amend as the additional information is received.

Please let me know if it is necessary to mail the hard copies of these forms in order to be considered.

Thanks,

Michele Hodges

Manager, Property Tax

michele.hodges@hp.com
T +1 470 212 9475
F +1 855 373 4409
Hewlett-Packard Company
5555 Windward Parkway
MS A3D706C
Alpharetta, GA 30004
United States

