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## APPLICATION FOR FINANCIAL ASSISTANCE

### Oneida County Industrial Development Agency

584 Phoenix Drive

Rome, New York 13441-1405

(315) 338-0393 telephone

(315) 338-5694 fax

<https://www.oneidacountyida.org/>

Shawna M. Papale, Executive Director

[spapale@mvedge.org](mailto:spapale@mvedge.org)

**Please submit the signed and notarized completed application (Pages 1-28 ONLY), which must include any applicable addendum or supplemental information requested in the application, along with payment of a non-refundable \$500 Application Fee (\$5,000 for Solar applications) and a \$1,000 Commitment Fee (will be applied to final closing costs) to the Oneida County Industrial Development Agency, 584 Phoenix Drive, Rome NY 13441-1405, within 14 days prior to the OCIDA Board of Directors meeting at which you want the Application to be included on the Agenda. Wire transfer and ACH payments are acceptable but all related fees incurred by the Agency are payable by the Applicant. An electronic version of the application must accompany the original application via physical media or e-mail.**

Bartell Machinery Systems LLC High Bay Expansion

Project Name

Date of Submission

5-7-2026

## **Important Notes to Applicant:**

Upon the submission of this application to the OCIDA, the application becomes a public document. Be advised that any action brought before the Agency is public information. All agendas for the OCIDA are issued publicly prior to the full agency meeting. Upon the submission of this application to the OCIDA, the application becomes a public document and OCIDA is required by law to post on its website and make available to the public this Application and supporting materials. If when completing this Application, you deem any information to be specifically exempted from disclosure under Article Six of the Public Officers Law, please answer the question "This information is deemed to be exempt from disclosure under Article Six of the Public Officers Law and is submitted on the attached confidential addendum." It is acceptable to submit any confidential addendum electronically as a .pdf file separate from the application, but any confidential addendum must still be submitted with the hard copy of the full application (see Page 1). Please answer any such questions on a separate Addendum titled, "Confidential and Protected by Article Six of the Public Officers Law." If OCIDA is challenged to produce any information the Applicant identifies as protected, the Applicant will be required at its sole cost to defend such assertion on behalf of OCIDA.

The information requested by this application is necessary to determine the eligibility of your project for OCIDA benefits. Please answer all questions and respond "Not Applicable", "NA", or "none" where appropriate. If your response is an estimate, please indicate so. Attach additional sheets if more space is needed for a response. **All applications must include a completed and signed NYS SEQR form and Cost Benefit Analysis form (please consult with OCIDA) before the application is considered complete.**

By signing and submitting this Application, the Applicant acknowledges that it received a copy of the Uniform Tax Exemption Policy and the Oneida County IDA Penalty for Failure to Meet Employment Levels as adopted by the Agency and Agency Memorandums pertaining to the benefits of projects financed through the Agency.

A project financed through the Agency involves the preparation and execution of significant legal documents. Please consult with an attorney before signing any documents in connection with the proposed project. You will receive an engagement letter from the OCIDA legal counsel. You will be asked to sign the engagement letter acknowledging you will be responsible for all legal fees of OCIDA legal counsel and that you understand the process. Should you not close and legal services have been rendered by the OCIDA legal counsel, Applicant will be responsible for those costs.

If your project requires a public hearing, a representative of the applicant is required to be present. A date will be coordinated by the OCIDA legal counsel.

If you have any questions how to calculate the OCIDA's application fee please refer to the enclosed Memorandum to Companies -Sale Leaseback Transactions or contact the OCIDA.

**Part I: Applicant Information**

**Note:** In responding to the following questions, please keep in mind that the Applicant will be party to all of the documents and is the individual or if entity will be formed which will receive the actual financial assistance from the Agency.

**Applicant**

1(a) Applicant's Legal Name: Bartell Machinery Systems, L.L.C.  
1(b) Principal Address: 6321 Elmer Hill Rd Rome, NY 13440

1(c) Telephone/Facsimile Numbers: 315-927-4508

1(d) Email Address: mstoots@bartellmachinery.com

1(e) Secondary Email Address blunduski@bartellmachinery.com

1(f) Contact Person: Michael Stoots

1(g) Is the Applicant a  Corporation:  If Yes, Public  Private   
If public, on which exchange is it listed?

- Subchapter S
- Sole Proprietorship
- General Partnership
- Limited Partnership
- Limited Liability Corporation/Partnership
- Single-Member LLC (name and EIN below):

Name: Bartell Machinery Systems, L.L.C  
EIN #: 36-4245371

- DISC
- Other(specify) \_\_\_\_\_

1(h) State of Organization (if applicable) Delaware

**Applicant's Stockholders, Members, Directors and Officers, Partners.**

2(a) Provide the following information with respect to any person with 15% or more in equity holdings in any entity in ownership chain of the project. Add additional sheets if necessary.

<u>Name</u>	<u>Address</u>	<u>Percentage of Ownership</u>
Heico Holding INC	27501 Bella Vista Pkwy, Warrenville, IL 60555	83%

2(b) Is the Applicant, or any of the individuals listed in 2(a) above, related directly or indirectly to any other entity by more than 50% common ownership? **If Yes**, indicate name of such entity and the relationship.  Yes  No

2(c) Is the Applicant affiliated with any other entity, directly or indirectly, other than as listed in the response to 2(a) above? **If Yes**, please indicate name and relationship of such other entity and the address thereof:  Yes  No

**Applicant's Counsel and Accountant**

**3(a) Applicant's Attorney**

Name/Title: Ahna Severts  
Firm: Heico Companies  
Address: 27501 Bella Vista Pkwy, Warrenville, IL 60555  
  
Telephone/Fax: +1 630 353 5037  
Email: ASeverts@heicocompanies.com

**3(b) Applicant's Accountant**

Name/Title: Jeff Diorio  
Firm: Bartell Machinery Systems LLC  
Address: 6321 Elmer Hill Rd Rome, NY 13440  
  
Telephone/Fax: \_\_\_\_\_  
Email: jdiorio@bartellmachinery.com

**Business Description**

**4(a)** Describe the nature of your business and principal products and/or services. Attach additional sheets if necessary.

Bartell Machinery is a custom Industrial machinery manufacturer. We make industrial machines that serve the Oil and Gas, Wire and Cable and Tire industries.

**Part II: Project Information**

**5(a)** Explain your project in detail. This description should include explanation of all activities which will occur due to this project. Attach additional sheets if necessary.

Bartell Machinery Systems, L.L.C. proposes the construction of a 22,400 square foot high-bay manufacturing facility expansion at its existing manufacturing site in the Town of Lee, Oneida County, New York.

Activities associated with this project will be construction type activities: 1. Site preparation and earth work, including additional pavement to accommodate for 3 additional loading docks, and 5 evergreen trees for landscaping.

2. Foundation and Structural work 3. Building envelope and exterior systems 4. Mechanical, electrical and plumbing 5. Interior build out and equipment integration 6. Final inspection and commissioning.

**Reasons for Project**

**6(a)** Please explain in detail why you want to undertake this project.

The primary purpose of this expansion is to increase production capacity in response to sustained growth in customer demand and increased order intake for manufactured equipment and assemblies. Current manufacturing operations are approaching the physical and operational limits of the existing facility. Space constraints are limiting the company's ability to efficiently stage materials, assemble larger equipment, add additional production lines, and support future workforce growth. The proposed expansion will allow the company to increase throughput, improve material flow, reduce internal congestion, and support long-term business continuity and growth, while remaining at the current site.

The expansion will be fully integrated with existing operations and infrastructure and will not change the fundamental nature of the manufacturing activities currently performed on site.

**6(b)** Why are you requesting the involvement of the Agency in your project?

We are requesting Agency help in order to get a sales tax exemption, and PILOT tax help for this expansion to increase project viability. The exemption directly supports the Agency's mission by encouraging capital investment, supporting job retention and potential job growth, and reinforcing the long-term economic stability of the company within Oneida County.

6(c) Please confirm by checking the box below, if there is the likelihood that the Project would not be undertaken **BUT FOR** the Financial Assistance provided by the Agency.

Yes  No

If the Project could be undertaken without Financial Assistance provided by the Agency, ("**No**" is checked above) then provide a statement in the space provided below indicating why the Agency should approve the requested assistance:

While Bartell Machinery Systems, L.L.C. desires to proceed with the proposed 22,400 square foot manufacturing expansion, failure to acquire tax exemption including the PILOT program could place the viability of the project in jeopardy. The requested sales tax exemption on construction materials and equipment is a critical component in maintaining the economic viability of the expansion by reducing upfront capital costs associated with building materials, equipment, and infrastructure improvements, along with the PILOT programming providing assistance with reduced property taxes to help alleviate the financial strain.

How will the Applicant's plans be affected or scaled back if Agency approval is not granted?

Without this assistance, the additional tax burden would divert capital away from other essential project elements, including production equipment, workforce expansion, safety improvements, and operational efficiencies that are integral to achieving the projects objectives.

6(d) Will the proposed project result in the Applicant or any project occupant moving from one area of the New York State to another area of the State or abandoning one or more facilities within the State

Yes  No

Is the proposed project reasonably necessary to preserve the competitive position of the Applicant or project occupant in its respective industry?

Yes  No

Is the proposed project reasonably necessary to discourage the applicant or project occupant from removing such other plant or facility to a location outside of New York State?

Yes  No

6(e) If you answered YES to any of the questions in 6(d) above, please provide a statement and evidence supporting the same. Include the name of all taxing jurisdictions in which the abandoned facility or plant lies, and whether Applicant has had any discussions with said taxing jurisdictions regarding the abandonment. Please provide as much detail as possible below.

Bartell Machinery Systems, L.L.C. operates in a competitive manufacturing environment where facility capability, cost structure, and operational efficiency are critical to remaining viable. The Company's existing facility has reached practical capacity limitations that restrict production growth, workflow efficiency, and the ability to accommodate increased order volume and larger equipment assemblies. Absent the proposed 22,400 square foot high-bay expansion, Bartell would be required to evaluate alternative locations capable of supporting current and future manufacturing needs, including facilities located outside of New York State. Without this expansion we would not be able to intake orders that continue to preserve our competitive position within the oil and gas industry.

6(f) Has the Applicant or any related entity previously secured financial assistance in Oneida County (whether through the Agency, the Empire State Development Corporation, or any other entity)?  Yes  No

**If Yes**, please explain (indicate date of benefit, location of facility and outstanding balance).

Bartell recieved OCIDA benefits in the 2006 Expansion.

6(g) Has the Applicant or any related entity secured financial assistance anywhere within the United States within the last 90 days or does the Applicant or any related entity anticipate receiving financial assistance within the next 90 days?  Yes  No

**If Yes**, please explain.

6(h) Check all categories best describing the type of project for all end users at project site (you may check more than one; if checking more than one indicate percentage of square footage the use represents):

Please provide percentage of sq. footage for each use (if more than one category):

- |                                     |                                |                      |   |
|-------------------------------------|--------------------------------|----------------------|---|
| <input type="checkbox"/>            | Manufacturing                  | <input type="text"/> | % |
| <input checked="" type="checkbox"/> | Industrial Assembly or Service | 100                  | % |
| <input type="checkbox"/>            | Back office operations         | <input type="text"/> | % |
| <input type="checkbox"/>            | Research and Development       | <input type="text"/> | % |
| <input type="checkbox"/>            | Technology/Cybersecurity       | <input type="text"/> | % |
| <input type="checkbox"/>            | Warehousing                    | <input type="text"/> | % |
| <input type="checkbox"/>            | Commercial or Recreational     | <input type="text"/> | % |
| <input type="checkbox"/>            | Retail                         | <input type="text"/> | % |

Add Housing Addendum

- |                          |   |                      |   |
|--------------------------|---|----------------------|---|
| <input type="checkbox"/> | Residential housing (specify) _____                                 | <input type="text"/> | % |
| <input type="checkbox"/> | Pollution Control (specify) _____                                   | <input type="text"/> | % |
| <input type="checkbox"/> | Environmental (e.g., Brownfield) (specify) _____                    | <input type="text"/> | % |
| Add Solar Addendum       | <input type="checkbox"/> Other (specify ie; renewable energy) _____ | <input type="text"/> | % |

6(i) Check all categories best describing the **scope of the project**:

- Acquisition of land
- Acquisition of existing building
- Renovations to existing building
- Construction of addition to existing building
- Demolition of existing building or part of building
- Construction of a new building
- Acquisition of machinery and/or equipment
- Installation of machinery and/or equipment
- Other (specify) \_\_\_\_\_

6(j) Please indicate the financial assistance you are requesting of the Agency, and provide the estimated value of said assistance. Attach a sheet labeled Annual PILOT that shows the annual utilization of the Real Property Tax Abatement by year and by taxing jurisdiction (PLEASE CONSULT WITH IDA STAFF ON PILOT CALCULATIONS).

<u>Assistance Requested</u>	<u>Estimated Values</u>
<input checked="" type="checkbox"/> <b>Fill-in</b> Real Property Tax Abatement (value of PILOT savings): \$	<u>119,521</u>
<input type="checkbox"/> Mortgage Tax Exemption (.75%) \$	<u>0.00</u>
Amount of mortgage: \$ _____ (fill-in)	
<input checked="" type="checkbox"/> Sales and Use Tax Exemption ** (8.75%) \$	<u>350,000.00</u> (Not available for solar)
Value of goods/services to be exempted from sales tax: \$	<u>4,000,000</u> (fill-in)
<input type="checkbox"/> Issuance by the Agency of Tax Exempt Bonds(bond dollar value)\$	_____

**\*\* TOTAL EXEMPTION ASSISTANCE REQUESTED: \$ 469,521**

Is the financial assistance requested by the Applicant consistent with the IDA's Uniform Tax Exemption Policy?  Yes  No

**If No**, please provide a written statement describing the financial assistance being requested and detailing the reasons the IDA should consider deviating from its Policy.

\*\* Note that the estimate provided above will be provided to the New York State Department of Taxation and Finance. The Applicant acknowledges that the transaction documents will include a covenant by the Applicant that the estimate, above, represents the maximum amount of sales and use tax benefit currently authorized by the Agency with respect to this Application. The Agency may utilize the estimate, above, as well as the (9)proposed total Project Costs as contained within this Application, to determine the Financial Assistance that will be offered. It is the responsibility of the applicant to inform the IDA within 10 days if the project amount changes.

**Part III: Facility Information**

**Attach copies of the most recent real property tax bills. Include copies for all taxing jurisdictions for the site/ facility that IDA assistance is being sought.**

**Facility (Physical Information) If multiple locations please provide information on all.**

7(a) Street Address of Facility:

**6321 Elmer Hill Road**

7(b) City, Town and/or Village (list ALL incorporated municipalities):

**Rome, NY 13440**

7(c) School District:

**Rome**

7(d) For what purpose was the facility site most recently used (i.e., light manufacturing, heavy manufacturing, assembly, etc.)?

**Manufacturing and Assembly.**

7(e) Zoning Classification of location of the project:

**Commercial**

7(f) Please describe in detail the facility to be acquired, constructed or renovated (including number of buildings, square footage, number of floors, type of construction,) and attach plot plans, photos or renderings, if available. If there are infrastructure improvements (water, sewer, gas, electrical, etc.) please provide details along with who will carry out those improvements and who will fund them. **Please be as specific as possible.**

The building to be constructed is a 22,400 Sqft single story pre fabricated Butler metal building. Pike construction is our General Contractor in charge of this build. The work will be then sub contracted out to various contractors throughout our region.(PIKE to put together design package to send)

7(g) Has construction or renovation commenced?  Yes  No

**If Yes**, please describe the work in detail that has been undertaken to date, including the date of commencement.

**If No**, indicate the estimated dates of commencement and completion:

Construction Commencement: 05/2026

Construction completion: 01/2027

7(h) Will the construction or operation of the facility or any activity which will occur at the site require any local ordinance or variance to be obtained or require a permit or prior approval of any state or federal agency or body (other than normal occupancy and/or construction permits)?

Yes  No

**If Yes**, please describe.

We needed an area use variance, it was approved through the town of LEE Zoning board.

Has the Project received site plan approval from the Planning Department?

Yes  No  N/A

**If Yes**, please provide the Agency with a copy of the planning department approval along with the related State Environmental Quality Review (SEQR) determination. If no, please provide the status of approval:

7(i) Will the project have a significant effect on the environment?  Yes  No

**Important: please attach and sign Part 1 of either the the long or short Environmental Assessment Form to this Application.**

7(j) What is the useful life of the facility? 40 years

7(k) Is the site in a former Empire Zone?  Yes  No

**If Yes**, which Empire Zone? Oneida Cour

Is project located in a Federal HUB Zone or distressed area:  Yes  No  
Provide detail.

**ALL APPLICANTS MUST ANSWER PART IV-8(a)**

**Part IV: Retail Project Questionnaire**

To ensure compliance with Section 862 of the New York General Municipal Law, the Agency requires additional information if the proposed Project is one where customers personally visit the Project site to undertake either a retail sale transaction or to purchase services.

**8(a).** Will any portion of the project (including that portion of the cost to be financed from equity or other sources) consist of facilities or property that are or will be primarily used in making sales of goods or services to customers who personally visit the project site?

Required  Yes or  No If the answer is YES, please continue below.  
If the answer is NO, proceed to Section Part V - Facility (Legal Info)

For purposes of Question A, the term "retail sales" means (i) sales by a registered vendor under Article 28 of the Tax Law of the State of New York (the "Tax Law") primarily engaged in the retail sale of tangible personal property (as defined in Section 1101(b)(4)(i) of the Tax Law), or (ii) sales of a service to customers who personally visit the Project.

**8(b).** 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? \_\_\_\_\_%. **If the answer is less than 33% do not complete the remainder of this retail determination page and proceed to next section, Part V Facility (Pg 13)**

**\* If the answer to A above is Yes AND the answer to B above is greater than 33.33%, indicate which of the following questions below apply to the project:**

1. Will the project be operated by a not-for-profit corporation  Yes  No

2. Is the Project location or facility likely to attract a significant number of visitors from outside Oneida County?

Yes  No

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

3. Is the predominant purpose of the project to make available goods or services which would not, but for the project, be reasonably accessible to the residents of the municipality within which the proposed project would be located because of a lack of reasonably accessible retail trade facilities offering such goods or services?

Yes  No

If yes, please provide a third party market analysis that demonstrates that a majority of the project's customers are expected to come from outside of Oneida County and the project will not directly compete with existing businesses located in Oneida County.

**Part V: Facility (Legal Information)**

**9(a)** With respect to the **present owner** of the land or facility, please give the following information and provide a brief statement regarding the status of the acquisition.

*(Note: the present owner is not necessarily the user of the facility, but that party which holds legal title to the facility.)*

Legal Name: Rome Properties, L.L.C  
Address: 6321 Elmer Hill Rd Rome NY, 13440  
Telephone: 315-336-7600  
Balance of Mortgage: N/A  
Holder of Mortgage: N/A

If the Applicant is not the present owner of the facility, please attach any written agreements and contracts concerning the acquisition of the real property and/or equipment.

N/A

**9(b)** Is there a legal relationship, directly or indirectly, by virtue of common control or through related persons, between the Applicant and the present owner of the facility?  
 Yes  No. **If Yes**, please explain.

The Heico Companies L.L.C. has effective control over Bartell Machinery Systems L.L.C and Rome Properties L.L.C

**9(c)** Will a related real estate holding company, partnership or other entity, be involved in the ownership structure of the transaction?  
 Yes  No. **If Yes**, please explain.

Rome Properties L.L.C is a real estate holding company.

**9(d)** Will the title owner of the facility/property also be the user of the facility?  
 Yes  No **If Yes**, please explain.

Bartell Machinery Systems LLC will be the tenant of the facility.

9(e) Is the Applicant currently a tenant in the facility?  Yes  No

9(f) Are you planning to use the entire proposed facility?  
 Yes  No

If **No**, please give the following information with respect to tenant(s) which will remain in the facility after the completion of the project, including the square footage the Applicant will occupy:

Name of Tenant	Floors Occupied	Sq. Ft. Occupied	Nature of Business

9(g) Are any of the tenants related to the owner of the facility?  
 Yes  No **If Yes**, please explain.

The Heico Companies L.L.C. has effective control over Bartell Machinery Systems L.L.C and Rome Properties L.L.C

9(h) Will there be any other users utilizing the facility?  
 Yes  No

**If Yes**, please explain. Provide detail of the contractual arrangement including any financial exchange for the use of the site or property.

### Part VI: Equipment

10(a) List the principal items or categories of equipment to be acquired as part of the project. If you are requesting sales tax exemption it is important to be as detailed as possible. (If a complete list is not available at time of application, as soon as one is available but prior to final authorizing resolution, please submit a detailed inventory of said equipment to be covered.) Attach a sheet if needed.

QTY:(2-4) 30 ton EMH Cranes, (Potentially a 200 amp inverter generator), Manufacturing equipment. IT infrastructure.

10(b) Please provide a brief description of any equipment which has already been purchased or ordered, attach all invoices and purchase orders, list amounts paid and dates of expected delivery. Attach a sheet if needed.

10(c) What is the useful life of the equipment? 40 years

**Part VII: Employment Information**

"FTE" shall mean a full time employee that has a minimum of thirty-five (35) scheduled hours per week, or any combination of two or more part-time employees that work a minimum of fifteen (15) scheduled hours per week, when combined together, constitute the equivalent of a minimum of thirty-five (35) scheduled hours per week, and whose workplace location is the project facility. For this purpose an employee shall include a leased employee regularly retained by the company.

**11(a)** Estimate how many construction jobs will be created or retained as a result of this project.

40

**11(b)** 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  No **If Yes**, explain below.

With this expansion it is expected to bring in 22 permanent positions to Bartell Machinery.

**11(c)** Have you experienced any employment changes (+ or -) in the last three (3) years?

Yes  No **If Yes**, explain below.

We have hired over 20 employees in the past 3 years

**11(d)** Job Information related to project \*\*\*

Estimate below how many jobs will be created and retained as a result of this project, if OCIDA assistance is granted. **PLEASE MAKE SURE TOTAL PART-TIME EMPLOYEES ARE TURNED INTO FULL-TIME EQUIVALENTS (FTE) for Line B. - See Pg. 17.**

Number of Jobs <b>BEFORE</b> Project	Location 1	Location 2	Location 3	Location 4	Location 5	
Address in NYS						<b>Total</b>
Full-Time Company	110					110
Full-Time Independent Contractors						0
Full-Time Leased						0
<b>A. Total Full-Time BEFORE</b>	110	0	0	0	0	110
Part-Time Company						0
Part-Time Independent Contractors						0
Part-Time Leased						0
<b>B. Total FTE Part-Timers BEFORE</b>						0
<b>C. Total FTE BEFORE*</b>	110	0	0	0	0	110

\*For **Total FTE BEFORE** add full-time employees (line A) plus part-time employees that have been converted to FTE (line B).

	Location 1	Location 2	Location 3	Location 4	Location 5	Total
<b>Number of Jobs AFTER Project (within 3 years of project completion)</b>						
Full-time Company	132					132
Full-Time Independent Contractors						0
Full-Time Leased						0
<b>A. Total Full-Time AFTER</b>	132	0	0	0	0	132
Part-Time Company						0
Part-Time Independent Contractors						0
Part-Time Leased						0
<b>B. Total FTE Part-Timers AFTER</b>						0
<b>C. Total FTE AFTER *</b>	132	0	0	0	0	132

*\*For Total FTE AFTER add full-time employees (line A) plus part-time employees that have been converted to FTE (line B).*

	Location 1	Location 2	Location 3	Location 4	Location 5	Total
<b>Estimate the number of residents from the Labor Market Area** in which the Project is located that will fill the JOBS CREATED within three years of project completion</b>						
<b>A. Full-Time</b>	22					22
<b>B. FTE Part-Timers</b>						0
<b>C. Total AFTER</b>	22	0	0	0	0	22

\*\* Labor Market Area includes Oneida, Lewis, Herkimer, and Madison Counties

Provide Any Notes To Job Information Below

SALARY AND BENEFITS	Retained Jobs		Created Jobs	
	Average Annual Salary per employee	Average Fringe Benefits (as a percentage of wages)	Average Annual Salary per employee	Average Fringe Benefits (as a percentage of wages)
Management	\$ 0	0 %	\$	0 %
Administrative	\$ 0	0 %	\$	0 %
Production	\$ 62,188	60 %	\$ 62,188	60 %
Independent Contractor	\$ 0	0 %	\$ 0	0 %
Other	\$ 86,667	40 %	\$ 86,667	40 %
Overall Weighted Average	\$ 68,864	100 %	\$ 68,864	100 %

\*\*\* By statute, Agency staff must project the number of Full-Time Jobs that would be retained and created if the request for Financial Assistance is granted. "FTE" shall mean a full time employee that has a minimum of thirty-five (35) scheduled hours per week, or any combination of two or more part-time employees that work a minimum of fifteen (15) scheduled hours per week, when combined together, constitute the equivalent of a minimum of thirty-five (35) scheduled hours per week, and whose workplace location is the project facility. For this purpose an employee shall include a leased employee regularly retained by the company.

11(e) Please list NAICS codes for the jobs affiliated with this project:

333248

**Part VIII: Estimated Project Cost and Financing**

**12(a)** List the costs necessary for preparing the facility.

LAND Acquisition	\$	0	(If lease value use OTHER below)
Existing Building(s) ACQUISITION	\$	0	
Existing Building(s) RENOVATION	\$	0	
NEW Building(s) CONSTRUCTION	\$	5,268,500	
Site preparation/parking lot construction	\$	1,020,000	
Machinery & Equipment that is TAXABLE	\$	500,000	
Machinery & Equipment that is TAX-EXEMPT	\$	0	
Furniture & Fixtures	\$		
Installation costs	\$		
Architectural & Engineering	\$	201,500	
Legal Fees (applicant, IDA, bank, other counsel)	\$	0	
Financial (all costs related to project financing)*	\$	0	
Permits (describe below)	\$	10,000	
Other (describe below) ie: solar decommissioning expense)	\$	0	

Other:	Cost:	Subtotal \$
1. <input type="text"/>	<input type="text"/>	7,000,000
2. <input type="text"/>	<input type="text"/>	
3. <input type="text"/>	<input type="text"/>	
4. <input type="text"/>	<input type="text"/>	
5. <input type="text"/>	<input type="text"/>	
		Agency Fee <sup>1</sup> \$ 35,000
		<b>Total Project Cost \$ 7,035,000</b>

\* **Bank fees, title insurance, appraisals, environmental reviews, etc.**

<sup>1</sup> **See Attached Fee Schedule (Page 22) for Agency Fee amount to be placed on this line.**

Permit/Other Information

Building permit from town of Lee.

**12(b)** Has the Applicant contacted any bank, financial institution or private investor with respect to financing the proposed project?  Yes  No **If Yes**, please provide details below.

**12(c)** Has the Applicant received a commitment letter for said financing? **If Yes**, please provide a copy along with this application.  Yes  No

**12(d) Sources of Funds for Project Costs**

Bank Financing: ----- \$ 0

Equity (excluding equity that is attributed to grants/tax credits) -- \$ 7,035,000

Tax Exempt Bond Issuance (if applicable) ----- \$ \_\_\_\_\_

Taxable Bond Issuance (if applicable) ----- \$ \_\_\_\_\_

Public Sources (Include sum total of all state and federal tax credits and grants) Break out individually below.----- \$ \_\_\_\_\_

Identify each Public state and federal grant/credit:

Comments:

Source	<input type="text"/>	\$	<input type="text"/>	
Source	<input type="text"/>	\$	<input type="text"/>	
Source	<input type="text"/>	\$	<input type="text"/>	
Source	<input type="text"/>	\$	<input type="text"/>	

**Total Sources of Funds for Project Costs:** \$ 7,035,000

**Part IX: Real Estate Taxes**

**13(a)** For each tax parcel which comprises the facility, and for which assistance is being sought, please provide the following information using figures from the most recent tax year. If an increase in the assessment is anticipated due to the proposed project, please indicate the new estimated assessment amount in the **POST- PROJECT** column. Attach copies of the most recent tax bills for all jurisdictions.

Tax Map Parcel #	Current Land Assessment	Current Building Assessment	Current Total Assessment	Current Total Taxes Amount (\$)	Estimated Post-Project Assessment
188.001-4-42	\$ 3,150	\$ 97,410	\$ 100,560	\$ 96,400	\$ 123,260

**13(b)** Will the entirety of each tax parcel be subject to the PILOT?  YES  NO

**13(c)** If the entirety of each parcel will not be subject to the PILOT, will the municipality require a subdivision?  YES  NO

**\*If a subdivision is required, it is the responsibility of the Applicant to complete subdivision approval prior to commencement of the PILOT Agreement, and to provide the Agency with the tax parcel number(s) assigned.**

13(d) Address of Receiver of Town and/or Village Taxes (include all jurisdictions):

City of Rome Treasurer  
198 North Washington St.  
Rome NY, 13440

13(e) Address of Receiver of School Taxes:

Rome City Schools  
409 Bell Rd  
Rome NY, 13440

13(f) Has the current property owner or user been granted an Ag-District exemption on the tax map parcel anytime during the past 4 years?

Yes  No

If Yes explain below.

13(g) Please consult with Agency staff to complete a Cost/Benefit Analysis form to attach to this Application.

Use space below for additional information

fact and do not omit to state a material fact necessary to make the statements contained herein not misleading.

13. The Applicant acknowledges receipt of notice from the Agency pursuant to Section 224-a(8)(d) of the New York Labor Law that the estimated mortgage recording tax exemption benefit amount, the estimated sales and use tax exemption benefit amount, and the estimated real property tax abatement benefit amount as so identified within this Application are "public funds" and not otherwise excluded under Section 224-a(3) of the New York Labor Law. Applicant further acknowledges and understands that it has certain obligations as related thereto pursuant to Section 224-a(8)a) of the New York Labor Law.

STATE OF NEW YORK )  
COUNTY OF ONEIDA ) ss.:

\_\_\_\_\_, being first duly sworn, deposes and says:

1. That I am the Facility Manager (Corporate Office) of Bartell Machinery Systems LLC (Applicant) and that I am duly authorized on behalf of the Applicant to bind the Applicant.
2. That I have read the attached Application, I know the contents thereof, and that to the best of my knowledge and belief, this Application and the contents of this Application are true, accurate and complete.

Alex Stead  
(Signature of Officer)

Subscribed and affirmed to me under penalties of perjury  
this 7<sup>th</sup> day of May, 2026.

Steven Shepardson  
(Notary Public)

STEVEN SHEPARDSON  
Notary Public, State of New York  
REG. # 01SH0026686  
Qualified in Herkimer County  
My Commission Expires July 11, 2026

If the application has been completed by or in part by other than the person signing this application for the applicant please indicate who and in what capacity:

By: \_\_\_\_\_

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_

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

**Please submit the signed and notarized completed application along with payment of a non-refundable \$500 Application Fee and a \$1,000 Commitment Fee (will be applied to final closing costs) to the Oneida County Industrial Development Agency, 584 Phoenix Drive, Rome NY 13441-1405, within 14 days prior to the OCIDA Board of Directors meeting at which you want the Application to be included on the Agenda.** Wire transfer and ACH payments are acceptable but all related fees incurred by the Agency are payable by the Applicant. It is advised that an electronic version of the application accompany the original application via hard copy or e-mail. An electronic version of the application must accompany the original application via physical media or e-mail.

**ONEIDA COUNTY INDUSTRIAL DEVELOPMENT AGENCY  
COST/BENEFIT ANALYSIS  
Required by §859-a(3) of the  
New York General Municipal Law**

Date

4/21/2026

Name of Applicant: Bartell Machinery Systems, L.L.C.

Description of Project: Bartell Machinery is constructing a 22,400 SF manufacturing facility expansion

Name of All Sublessees or Other Occupants of Facility: \_\_\_\_\_  
\_\_\_\_\_

Principals or Parent of Applicant: Heico Holding Inc.

Products or Services of Applicant to be produced or carried out at facility: Industrial machines

Estimated Date of Completion of Project: Mar-27

Type of Financing/ Structure: \_\_\_\_\_ Tax-Exempt Financing  
\_\_\_\_\_ Taxable Financing  
 Sale/ Leaseback  
\_\_\_\_\_ Other

Type of Benefits being Sought by Applicant: \_\_\_\_\_ Taxable Financing  
\_\_\_\_\_ Tax-Exempt Bonds  
 Sales Tax Exemption on Eligible Expenses Until Completion  
\_\_\_\_\_ Mortgage Recording Tax Abatement  
 Real Property Tax Abatement

**Project Costs**

Land Acquisition	\$ -
Existing Building(s) ACQUISITION	\$ -
Existing Building(S) RENOVATION	\$ -
NEW Building(s) CONSTRUCTION	\$ 5,268,500
Installation Costs	
Site Preparation/Parking Lot Construction	\$ 1,020,000
Machinery & Equipment (other than furniture)	\$ 500,000
Furniture & Fixtures	\$ -
Architectural & Engineering	\$ 201,500
Legal Fees (applicant, IDA, bank, other counsel)	
Financial (all costs related to project financing)	
Permits	\$ 10,000
Other	
Agency Fee	\$ 35,000
<b>TOTAL COST OF PROJECT</b>	<b>\$ 7,035,000</b>

**Assistance Provided by the Following:**

EDGE Loan:	
MVEDD Loan:	
Grants - Please indicate source & Amount:	\$ -
Other Loans - Please indicate source & Amount:	

**Company Information**

Existing Jobs  
Created Jobs FTE (over three years)  
Retained Jobs

110
22
132

**Average Salary of these Positions**

\$	68,864
\$	68,864
\$	68,864

**Earnings Information for Oneida County**

Average Salary of Direct Jobs for Applicant  
Average of County Indirect Jobs  
Average of Construction Jobs

\$	68,864
\$	25,000
\$	62,646

Note: \$1,000,000 in construction expenditures generates 15 person - years of employment  
Construction Person Years of Employment:

40
----

**Calculation of Benefits (3 Year Period)**

	Total Earnings	Revenues
Direct Jobs		
Created	\$ 4,545,024	\$ 193,164
Existing	\$ 22,725,120	\$ 965,818
Indirect Jobs		
Created	\$ 4,125,000	\$ 175,313
Existing	\$ 20,625,000	\$ 876,563
Construction - only one year		
Person Years	\$ 2,505,840	\$ 106,498
<b>TOTALS Calculation of Benefits (3 Yr Period)</b>	<b>\$ 54,525,984</b>	<b>\$ 2,317,354</b>

**TAXABLE GOODS & SERVICES**

		Spending Rate	Expenditures	State & Local Sales Tax Revenues
Direct Jobs	Created	36%	\$ 1,636,209	\$ 159,530
	Existing	0.36	\$ 8,181,043	\$ 797,652
Indirect Jobs	Created	0.36	\$ 1,485,000	\$ 144,788
	Existing	0.36	\$ 7,425,000	\$ 723,938
Construction - only one year	Person Years	0.36	\$ 902,102	\$ 87,955
<b>TOTAL TAXABLE GOODS &amp; SERVICES</b>			<b>\$ 19,629,354</b>	<b>\$ 1,913,862</b>

Local (3 year) real property tax benefit (assuming 60% of jobs existing and created own a residence) with an average assessment of \$80,000 and the remainder of jobs existing created pay real property taxes through rent based on an average assessment per apartment of \$50,000.

		Municipality	
Tax Rate for School District where facility is located:	775.250265	Rome	25-26
Tax Rate for Municipality where facility is located:	0	Rome	2025
Tax Rate for County:	10.069977	Oneida	2025
	Total Rate:		
			785.320242
Real Property Taxes Paid:	\$ 7,049,034		

**COSTS: IDA BENEFITS**

Real Property Taxes Abatement	\$ 119,521
Mortgage Tax Abated (.75%)	\$ -
Estimated Sales Tax Abated During Construction Period (8.75%)	\$ 350,000
Total:	\$ 469,521

NOTE: If there is a tax-exempt financing of all or a portion of the project cost, there is a neutral cost/benefit because of lower interest rates by reason of exclusion of interest from gross income of bondholders for purposes of Federal and State income taxes. Taxable financing carries the same cost/benefit for State Income Tax purposes. Such cost/benefits cannot be quantified.

**TOWN OF LEE  
PLANNING BOARD  
P. O. BOX 191  
LEE CENTER, NY 13363**

**To:** James Genovese, Commissioner, Oneida County Planning Department

**From:** Robert Kullmann, Chairperson, Town of Lee Planning Board



**Date:** May 5, 2026

**Re:** Final Documentation for Bartell Machinery Systems, LLC Manufacturing Facilities Building Addition – Site Plan and SEQR

In response to your request regarding Paragraph 7(h) of the project review, please find the enclosed documentation for the Bartell Machinery Company's 22,000 square foot manufacturing expansion. As the designated Lead Agency, the Town of Lee Planning Board has concluded its State Environmental Quality Review (SEQR). Regarding Paragraph 7(h), a Use Variance was granted by the Town of Lee Zoning Board of Appeals on March 17, 2026, and the Town of Lee Planning Board has subsequently issued a Negative Declaration, determining that the project will not result in significant adverse environmental impacts.

**Enclosures:**

1. Certified Resolution of Site Plan Approval and SEQR Negative Declaration.
2. Completed Short Environmental Assessment Form (SEAF) Parts 1, 2, and 3.
3. Signed and Stamped Site Plan (dated April 14, 2026).
4. Copy of the ZBA Use Variance Resolution.
5. Determination of Environmental Significance

**TOWN OF LEE  
PLANNING BOARD  
P. O. BOX 191  
LEE CENTER, NY 13363**

**RESOLUTION OF THE TOWN OF LEE PLANNING BOARD  
SEQR NEGATIVE DECLARATION AND SITE PLAN APPROVAL**

**WHEREAS**, the Town of Lee Planning Board has received an application from Bartell Machinery Systems, LLC for a 22,000 square foot addition to their existing manufacturing facility located at 6321 Elmer Hill Road, Tax Map I.D 188.001-4-42; and

**WHEREAS**, the Town of Lee Planning Board was duly designated as Lead Agency for the State Environmental Quality Review (SEQR) and has classified this as an **Unlisted Action**; and

**WHEREAS**, the Town of Lee Planning Board on April 14, 2026 has reviewed the Short Environmental Assessment Form (EAF), the site plan, and comments from the Oneida County Planning Department; and

**WHEREAS**, a Use Variance for the property was previously granted by the Town of Lee Zoning Board of Appeals (ZBA) on March 17, 2026; and

**WHEREAS**, the Town of Lee Planning Board has performed a Site Plan Review that included an evaluation of potential environmental impacts. The subject expansion involves no new water/sewage demands, and stormwater will be managed via the enlargement of an existing retention pond.

**NOW, THEREFORE, BE IT RESOLVED**, that the Town of Lee Planning Board hereby determines that the proposed action will not result in any significant adverse environmental impacts and issues a Negative Declaration; and

**BE IT FURTHER RESOLVED** that the Town of Lee Planning Board hereby grants Site Plan Approval for the project as depicted in the plans dated February 5, 2026, as prepared by Pike Construction Services subject to the following conditions:

1. Compliance with the approved Stormwater Pollution Prevention Plan (SWPPP) during construction.

Planning Board Motion by: Dennis Sexton Seconded by: Jessica Perry

Vote: Ayes: 7 Nays: 0

Date: April 14, 2026

2. Adherence to all conditions set forth in the ZBA Use Variance dated March 17, 2026.

ZBA Motion by: Joseph Gates Seconded by: Derek Utter

Vote: Ayes: 3 Nays: 0

Date: March 17, 2026

  
Robert Kullmann, Chairperson  
May 5, 2026

## Short Environmental Assessment Form

### Part 1 - Project Information

#### Instructions for Completing

**Part 1 – Project Information.** The applicant or project sponsor is responsible for the completion of Part 1. Responses become part of the application for approval or funding, are subject to public review, and may be subject to further verification. Complete Part 1 based on information currently available. If additional research or investigation would be needed to fully respond to any item, please answer as thoroughly as possible based on current information.

Complete all items in Part 1. You may also provide any additional information which you believe will be needed by or useful to the lead agency; attach additional pages as necessary to supplement any item.

<b>Part 1 – Project and Sponsor Information</b>			
Bartell Machinery Systems L.L.C.			
Name of Action or Project: Hig Bay Expansion			
Project Location (describe, and attach a location map): 6321 Elmer Hill Rd			
Brief Description of Proposed Action: 112'x202' addition to manufacturing facility,  including additional pavement and stormwater facility expansion.			
Name of Applicant or Sponsor: Bartell Machinery Systems L.L.C.		Telephone: 315-927-4508	
Address: 6321 Elmer Hill Rd		E-Mail: mstools@bartellmachinery.com	
City/PO: Rome		State: NY	Zip Code: 13440
1. Does the proposed action only involve the legislative adoption of a plan, local law, ordinance, administrative rule, or regulation? If Yes, attach a narrative description of the intent of the proposed action and the environmental resources that may be affected in the municipality and proceed to Part 2. If no, continue to question 2.			NO <input type="checkbox"/>
			YES <input type="checkbox"/>
2. Does the proposed action require a permit, approval or funding from any other government Agency? If Yes, list agency(s) name and permit or approval: Building Permit Town of LEE Town of Lee Planning Board approval, NYS DEC SPDES permit			NO <input type="checkbox"/>
			YES <input checked="" type="checkbox"/>
3. a. Total acreage of the site of the proposed action?		_____ 1 acres	
b. Total acreage to be physically disturbed?		_____ 1.625 acres	
c. Total acreage (project site and any contiguous properties) owned or controlled by the applicant or project sponsor?		_____ 17.7 acres	
4. Check all land uses that occur on, are adjoining or near the proposed action:			
<input type="checkbox"/> Urban <input type="checkbox"/> Rural (non-agriculture) <input checked="" type="checkbox"/> Industrial <input checked="" type="checkbox"/> Commercial <input type="checkbox"/> Residential (suburban)			
<input type="checkbox"/> Forest <input type="checkbox"/> Agriculture <input type="checkbox"/> Aquatic <input type="checkbox"/> Other(Specify):			
<input type="checkbox"/> Parkland			

	NO	YES	N/A
5. Is the proposed action,			
a. A permitted use under the zoning regulations?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Consistent with the adopted comprehensive plan?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6. Is the proposed action consistent with the predominant character of the existing built or natural landscape?	NO <input type="checkbox"/>	YES <input checked="" type="checkbox"/>	
7. Is the site of the proposed action located in, or does it adjoin, a state listed Critical Environmental Area? If Yes, identify: _____	NO <input checked="" type="checkbox"/>	YES <input type="checkbox"/>	
8. a. Will the proposed action result in a substantial increase in traffic above present levels?	NO <input checked="" type="checkbox"/>	YES <input type="checkbox"/>	
b. Are public transportation services available at or near the site of the proposed action?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
c. Are any pedestrian accommodations or bicycle routes available on or near the site of the proposed action?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
9. Does the proposed action meet or exceed the state energy code requirements? If the proposed action will exceed requirements, describe design features and technologies: Insulation and air handling requirements per NYS code along with Snow load. _____ _____	NO <input type="checkbox"/>	YES <input checked="" type="checkbox"/>	
10. Will the proposed action connect to an existing public/private water supply? If No, describe method for providing potable water: _____ _____	NO <input type="checkbox"/>	YES <input checked="" type="checkbox"/>	
11. Will the proposed action connect to existing wastewater utilities? If No, describe method for providing wastewater treatment: _____ There will be no Bathrooms in this addition. _____	NO <input checked="" type="checkbox"/>	YES <input type="checkbox"/>	
12. a. Does the project site contain, or is it substantially contiguous to, a building, archaeological site, or district which is listed on the National or State Register of Historic Places, or that has been determined by the Commissioner of the NYS Office of Parks, Recreation and Historic Preservation to be eligible for listing on the State Register of Historic Places?	NO <input checked="" type="checkbox"/>	YES <input type="checkbox"/>	
b. Is the project site, or any portion of it, located in or adjacent to an area designated as sensitive for archaeological sites on the NY State Historic Preservation Office (SHPO) archaeological site inventory?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
13. a. Does any portion of the site of the proposed action, or lands adjoining the proposed action, contain wetlands or other waterbodies regulated by a federal, state or local agency?	NO <input checked="" type="checkbox"/>	YES <input type="checkbox"/>	
b. Would the proposed action physically alter, or encroach into, any existing wetland or waterbody?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
If Yes, identify the wetland or waterbody and extent of alterations in square feet or acres: _____ _____ _____			

<p>14. Identify the typical habitat types that occur on, or are likely to be found on the project site. Check all that apply:</p> <p><input type="checkbox"/> Shoreline   <input type="checkbox"/> Forest   <input checked="" type="checkbox"/> Agricultural/grasslands   <input type="checkbox"/> Early mid-successional</p> <p><input type="checkbox"/> Wetland   <input type="checkbox"/> Urban   <input type="checkbox"/> Suburban</p>		
15. Does the site of the proposed action contain any species of animal, or associated habitats, listed by the State or Federal government as threatened or endangered?	NO	YES
	<input checked="" type="checkbox"/>	<input type="checkbox"/>
16. Is the project site located in the 100-year flood plan?	NO	YES
	<input checked="" type="checkbox"/>	<input type="checkbox"/>
17. Will the proposed action create storm water discharge, either from point or non-point sources?	NO	YES
If Yes,	<input type="checkbox"/>	<input checked="" type="checkbox"/>
a. Will storm water discharges flow to adjacent properties?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Will storm water discharges be directed to established conveyance systems (runoff and storm drains)?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
If Yes, briefly describe:		
Storm Water Retention Pond		
18. Does the proposed action include construction or other activities that would result in the impoundment of water or other liquids (e.g., retention pond, waste lagoon, dam)?	NO	YES
If Yes, explain the purpose and size of the impoundment:		
But we have a retention pond in order to facilitate any unforeseen impoundment of water,	<input checked="" type="checkbox"/>	<input type="checkbox"/>
19. Has the site of the proposed action or an adjoining property been the location of an active or closed solid waste management facility?	NO	YES
If Yes, describe:	<input checked="" type="checkbox"/>	<input type="checkbox"/>
20. Has the site of the proposed action or an adjoining property been the subject of remediation (ongoing or completed) for hazardous waste?	NO	YES
If Yes, describe:	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<p><b>I CERTIFY THAT THE INFORMATION PROVIDED ABOVE IS TRUE AND ACCURATE TO THE BEST OF MY KNOWLEDGE</b></p> <p>Applicant/sponsor/name: <u>Bartell Machinery Systems L.L.C./ Mike Stoots</u> Date: <u>12/18/2025</u></p> <p>Signature: <u>Michael Stoots</u> Title: <u>EHS Compliance and Facilities Manager</u></p>		

**PRINT FORM**

Agency Use Only [If applicable]

Project:

Date:

**Short Environmental Assessment Form  
Part 2 - Impact Assessment**

**Part 2 is to be completed by the Lead Agency.**

Answer all of the following questions in Part 2 using the information contained in Part 1 and other materials submitted by the project sponsor or otherwise available to the reviewer. When answering the questions the reviewer should be guided by the concept "Have my responses been reasonable considering the scale and context of the proposed action?"

	No, or small impact may occur	Moderate to large impact may occur	
1. Will the proposed action create a material conflict with an adopted land use plan or zoning regulations?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	--OK
2. Will the proposed action result in a change in the use or intensity of use of land?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	--OK
3. Will the proposed action impair the character or quality of the existing community?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	--OK
4. Will the proposed action have an impact on the environmental characteristics that caused the establishment of a Critical Environmental Area (CEA)?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	--OK
5. Will the proposed action result in an adverse change in the existing level of traffic or affect existing infrastructure for mass transit, biking or walkway?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	--OK
6. Will the proposed action cause an increase in the use of energy and it fails to incorporate reasonably available energy conservation or renewable energy opportunities?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	--OK
7. Will the proposed action impact existing: a. public / private water supplies? b. public / private wastewater treatment utilities?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	--OK
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
8. Will the proposed action impair the character or quality of important historic, archaeological, architectural or aesthetic resources?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	--OK
9. Will the proposed action result in an adverse change to natural resources (e.g., wetlands, waterbodies, groundwater, air quality, flora and fauna)?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	--OK
10. Will the proposed action result in an increase in the potential for erosion, flooding or drainage problems?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	--OK
11. Will the proposed action create a hazard to environmental resources or human health?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	--OK

**PRINT FORM**

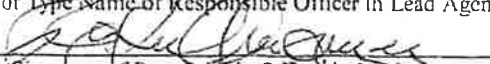

Agency Use Only [If applicable]

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

### Short Environmental Assessment Form Part 3 Determination of Significance

For every question in Part 2 that was answered "moderate to large impact may occur", or if there is a need to explain why a particular element of the proposed action may or will not result in a significant adverse environmental impact, please complete Part 3. Part 3 should, in sufficient detail, identify the impact, including any measures or design elements that have been included by the project sponsor to avoid or reduce impacts. Part 3 should also explain how the lead agency determined that the impact may or will not be significant. Each potential impact should be assessed considering its setting, probability of occurring, duration, irreversibility, geographic scope and magnitude. Also consider the potential for short-term, long-term and cumulative impacts.

There will not be any negative impacts to the environment or other with this building addition. It will be built in accordance with applicable codes and requirements.

<input type="checkbox"/>	Check this box if you have determined, based on the information and analysis above, and any supporting documentation, that the proposed action may result in one or more potentially large or significant adverse impacts and an environmental impact statement is required.
<input checked="" type="checkbox"/>	Check this box if you have determined, based on the information and analysis above, and any supporting documentation, that the proposed action will not result in any significant adverse environmental impacts.
Town of LEE PLANNING BOARD	4/14/20
Name of Lead Agency	Date
ROBERT E. KULLMAN	2020 CHAIRPERSON
Print or Type Name of Responsible Officer in Lead Agency	Title of Responsible Officer
	
Signature of Responsible Officer in Lead Agency	Signature of Preparer (if different from Responsible Officer)

PRINT FORM



**Determination of Environmental Significance under SEQRA  
for the consideration of the Site Plan Review requested by Mr. Michael Stoots,  
SGE, Facilities Manager of the Bartell Machinery Corp.**

**Background:**

As specified in the Town of Lee Zoning Law, the Town of Lee Planning Board has accepted designation as Lead Agency for the State Environmental Quality Review (SEQR) of a proposed 22,000 square foot manufacturing facility expansion on the lands owned by the Bartell Machinery Corporation located along the northeast corner of the intersection of Route 26 (Turin Road) and Elmer Hill Roads.

**Actions:**

The Planning Board has notified all involved agencies and additional interested agencies and requested their review and comment on the proposed installation.

- a) The Town of Lee Planning Board has been designated as the lead agency, Robert Kullmann, Chairperson, Lee Center, NY 13363;
- b) 6 NYCRR Section 617.49(b)(2) requires this action to be SEQR Type “Unlisted”, based on definitions within the SEQRA. A Short Environmental Assess Form (EAF) was completed. That EAF Form, including the Part II Impact Statement, was reviewed during the March 3, 2026 Planning Board meeting.
- c) The location of the proposed action is entirely within the Town of Lee, Oneida County, State of NY;
- d) Only an area of the Bartell Machinery property that extends 600 feet to the north of Elmer Hill Road and 600 feet to the east of Route 26 was designated as lying within the commercial property zone per Town of Lee Commercial District Map, Plate 3, originally prepared by the Oneida County Department of Planning.
  - A public hearing for the zoning Use Variance was held on March 17, 2026, and no comments from the public were received.
  - On March 17, 2026, the Town of Lee Zoning Board of Appeals voted unanimously to grant a Use Variance to allow manufacturing activities on the remainder of the Bartell Machinery property that was located within an R20 zone.
- e) Copies of the proposed design drawings that were prepared by Pike Construction Services, the consultant group for the Bartell expansion, and the Short EAF Forms were provided for review and comment to the New York Department of Environmental Conservation and the Oneida County Planning Department.
- f) No comments were received from involved and interested agencies.

**Review of Specific Criteria on EAF Form II:**

**a. Impacts on Land:**

The Board notes that the proposed installation is a 200’ long addition onto an existing building that is currently a manufacturing facility. This addition, which will be used as a machinery assembly area, will be compatible with allowed uses in a commercial district and with the Town Comprehensive Plan. The Town of Lee Zoning Law permits such facilities with a Use Variance.

**b. Impacts on Geological Features:**

The Planning Board finds that the proposed building addition is essentially identical to the existing building, and no special or unique geological features exist within the boundaries of the proposed installation.

**c. Impacts on Surface Water:**

Although the expansion increases impervious surface area by way of the 22,000 sq. ft. building addition and additional paved areas, the project design includes the enlargement of an existing stormwater retention pond to accommodate 100% of the new runoff. Proper management and erosion controls will be maintained during construction.

**d. Impacts on Groundwater:**

The Planning Board finds that the proposed facility will use existing city water facilities. In addition, no additional installation of water lines is anticipated within the new addition, except for the installation of a fire-sprinkler system.

**e. Impacts on Flooding:**

The Board finds that the completed installation will not redirect or increase the quantity of rain water onto adjacent properties as the existing stormwater retention pond is being enlarged to accommodate the additional runoff created by the impervious areas associated with the building expansion and additional paved areas. or change the existing topology of the area during actual use. The installation of stormwater catch basins on the paved areas and roof leaders with drain pipes routed to the retention pond along with minimal changes to the existing topology will ensure that stormwater drainage is contained.

**f. Impacts on Air:**

The Planning Board finds that the proposed installation will not produce any emissions during operation other than those associated with heating the building space.

**g. Impact on Plants and Animals:**

The property is currently used as a manufacturing site. No species of plant or animal requiring protection were identified. A County Planning Department review did not identify any concerns. The plans call for the removal of three spruce trees to be removed to facilitate construction. The final landscaping plans include the addition of four new trees to replace the trees to be removed.

**h. Impact on Agricultural Resources:**

There are currently no agricultural activities on Bartell properties.

**i. Impact on Aesthetic Resources:**

The Planning Board finds that there are no aesthetic resources located within the proposed installation area and finds no impact will occur.

- j. Impact on Historical and Archaeological Resources:**  
The Planning Board finds that this property has accommodated a manufacturing facility for over 40 years and the proposed installation will not result in an impact.
- k. Impact on Open Space and Recreation:**  
There are no recreational areas or open spaces located on the Bartell Properties.
- l. Impact on Critical Environmental Areas:**  
The Planning Board finds that, based on review of the Department of Environmental Conservation EAF Mapper application and the New York State Natural Heritage maps of heritage and protected areas, there are no critical environmental areas within the boundaries and finds no impact will occur.
- m. Impact on Transportation:**  
The Planning Board finds no potential for impact on traffic would occur. Bartell's estimates for additional employees range from fifteen to twenty.
- n. Impact on Energy:**  
The Planning Board finds that the proposed installation should use electrical power primarily for lighting, electrical tools industrial support and an overhead crane. These uses will not impose a significant amount or electrical load on the public utility infrastructure.
- o. Impact on Noise, Odor and Light:**  
The Planning Board finds that the installation will not produce any noxious odors or air pollutants. Pike Construction Services provided a lighting plan that included outdoor security and safety lighting. Their plan will not affect neighboring properties.
- p. Impact on Human Health:**  
There will be no additional restrooms or sewage disposal facilities associated with the proposed building expansion.
- q. Consistency with Community Plans and Community Character:**  
The architectural features of the proposed addition have been designed to match the existing building. The surrounding grounds will be maintained in the same well-kept fashion as they have been.

**Determination:**

In reaching the above conclusions, the Planning Board considered the short-term, long-term and cumulative effects of this proposed addition to the existing Bartell Machinery Systems building, along with reasonably likely impacts. Based on the foregoing considerations and conclusions, and pursuant to 6 NYCRR Section 617.7, SEQR Regulations, the Planning Board determines that the proposed action is Unlisted under those regulations, will have no significant environmental impact, determines that a Negative Declaration is appropriate and that an Environment Impact Statement, as defined in the SEQR regulations, is not required for the proposed action. The Planning Board further resolves that:

- a.** The Town of Lee Planning Board received the Short Environmental Assessment Form (Short EAF Form, Part I, II and III) and has reviewed and evaluated the information contained therein, and resolves that a finding of Negative Declaration based on the provisions of the SEQRA be made and documented on EAF Part III;
- b.** This determination, including the Negative Declaration, has been prepared in accordance with 6 NYCRR Section 617.12(a) and Article 8 of the New York Environmental Conservation Law.



Department of  
Environmental  
Conservation

## MS4 SWPPP Acceptance Form

for construction activities seeking authorization under the

### SPDES General Permit for Stormwater Discharges from Construction Activity, GP-0-25-001 (CGP)

(In accordance with CGP Part I.D.2.b., the completed form must be attached to the eNOI and submitted to NYSDEC electronically.)

#### I. Project Owner/Operator Information

1. Owner/Operator Name: Bartell Machinery Systems, LLC  
2. Contact Person: Michael Stoots  
3. Street Address: 6321 Elmer Road  
4. City/State/Zip: Rome, NY 13440

#### II. Project Site Information

5. Project/Site Name: Bartell Machinery Systems  
6. Street Address: 6321 Elmer Road  
7. City/State/Zip: Rome, NY 13440

#### III. Stormwater Pollution Prevention Plan (SWPPP) Review and Acceptance Information

8. SWPPP Reviewed by: Town of Lee, NY - Planning Board  
9. Title/Position:  
10. Date Final SWPPP Reviewed and Accepted: 4/14/2026

#### IV. Regulated MS4 Information

11. Name of MS4 Operator:  
12. MS4 SPDES Permit Identification Number: NYR20A  
13. Street Address:  
14. City/State/Zip:  
15. Telephone Number:

## MS4 SWPPP Acceptance Form - continued

### V. Certification Statement - MS4 Official (principal executive officer or ranking elected official) or Duly Authorized Representative

I hereby certify that the final Stormwater Pollution Prevention Plan (SWPPP) for the construction project identified in section II. of this form has been reviewed and meets the substantive requirements in the SPDES General Permit for Stormwater Discharges from Construction Activity, GP-0-25-001 (CGP).  
Note: The MS4 Operator, through the acceptance of the SWPPP, assumes no responsibility for the accuracy and adequacy of the design included in the SWPPP. In addition, review and acceptance of the SWPPP by the MS4 Operator does not relieve the owner/operator or their SWPPP preparer of responsibility or liability for errors or omissions in the plan.

Printed Name<sup>1</sup>: Robert E Kullmann

Title/Position: 2026 Chairperson - Town of Lee, NY Planning Board

Signature: 

Date: 4/14/2026

### VI. Additional Information

SWPPP was reviewed By the 7 Memeber Town of Lee, NY Planning Board on 4/14/2026.

Drawings were stamped approved and signed by Robert Kullmann, 2026 Chairperson

<sup>1</sup> Printed name of the principal executive officer or ranking elected official for the MS4 Operator or their duly authorized representative in accordance with CGP Part VII.J.2.