

Montgomery
INDUSTRIAL DEVELOPMENT AGENCY

PERFORMANCE
MEASUREMENT
REPORT

2022



EXECUTIVE SUMMARY

The Town of Montgomery IDA hired a new part-time Executive Director in August 2022 after a six month vacancy, and the new Executive Director Felicia Kalan became full-time in November 2022. While there were no approved projects in 2022, the Board and Executive Director worked to enhance economic development both locally and regionally, and also secured and reviewed three applicants including Milk Factory, LLC, KCE Energy NY 2, and Leonards Drive, LLC.

Much of the organizational effort was focused on administrative needs including hiring a new Executive Director Felicia Kalan and new secretary Lauren Rowley, hiring a new auditor PKF O'Connor Davies, updating files, updating policies, website and social media outreach, and training staff to make the necessary filing and audit requirements. Moreover, time and effort was spent forming relationships with key stakeholders and attending various community events.

NUMBER OF NEW FIRMS ASSISTED/NUMBER OF NEW JOBS CREATED/CAPITAL INVESTMENTS/NEW TAXES AND FEES COLLECTED

There were no new firms approved for PILOT in 2022, and no new jobs created or capital investments made, and no new taxes and fees collected. Three applicants were secured and reviewed including Milk Factory, LLC, KCE Energy NY 2, and Leonards Drive, LLC. Leonards Drive, LLC was deemed an ineligible project by the Board.

NUMBER OF JOBS RETAINED

2,103

Project Code	Project Type	Project Name	Total Exemption	Total PILOT	# of FTEs Before IDA Status	Current # of FTEs
3303-15-1	Bonds/Notes Issuance	The Cedars Apartment Project	0.00	0.00	2	3
333031302	Lease	Goodwill Properties, LLC	68,846.00	165,491.72	0	20
333031201	Lease	Hudson Heritage Federal Credit Union	0.00	0.00	5	5
33303-09-01	Lease	Kadge, LLC	269,258.00	168,360.10	36	116
333031202	Lease	Spruce Properties, LLC	17,142.00	52,273.52	0	32
3303-19-03	Lease	Stewart Holdings LLC	248,029.00	20,930.96	17	76
3303-19-02	Lease	The Montgomery Group, Inc.	359,450.00	1,017.53	40	91
2020-01	Lease	USEF Sailfish, LLC	1,204,776.00	719,724.16	0	1,285
333031301	Lease	United Natural Foods, Inc.	539,561.00	1,317,740.67	0	475

SUPPORTING LOCAL ECONOMIC GROWTH AND JOB GROWTH IN THE TOWN

- Working to identify potential developers that would be good partners with the Town
- Introductory meetings with local business owner communities and attending various Business Council meetings to meet local business owners
- Attending various stakeholders meetings for Town Board to improve existing sewage infrastructure in Town and Villages
- Researched Grant Opportunities including the Shovel Ready Grant and the Restore NY Grant, presented these funding opportunities to the Town of Montgomery and Village elected officials
- Identifying and touring available sites for development in the Town and Villages
- Creating framework for an IDA Fellowship Program to support local workforce development initiatives

SUPPORTING REGIONAL ECONOMIC GROWTH

- Attended NYATEP and NYSEDC Fall Conferences to get more of an understanding of regional approaches to economic development efforts, to network with colleagues, and to receive economic development related training and education
- Formed ongoing relationship with BOCES, Valley Central, and SUNY Orange for workforce development initiatives
- OC Economic Development Summit- SUNY Orange
- Orange County Partnership Networking Breakfasts
- Relationship building with key stakeholders

RELATIONSHIP BUILDING WITH PUBLIC AND PRIVATE SECTOR

- Town of Montgomery Board Supervisor Brian Maher and incoming Supervisor Ronald Feller, and Town Board members
- Membership and strong alliance forming with New York Economic Development Council
- New ED introductory meetings with Village of Montgomery Mayor introductory meeting, Village of Walden Mayor John Ramos and City Manager John Ravella, Introductory Meeting and ongoing communication with Village of Montgomery Mayor Steve Brescia, Village of Maybrook outreach but no follow-up.
- Toured Medline Industries, McKesson Corporation
- Orange County Partnership, Orange County Chamber of Commerce
- Greater Montgomery Business Council
- Valley Central School Board & Superintendent
- Orange County Workforce Development Coalition
- Ironworkers Union- Matthew Stoddard/IBEW Local 363 - John Dickson
- Local/Regional Farmers - Jeffrey Crist
- Cultivated relationships with various developers

ADDITIONAL QUESTIONS

1. Have the members of the Agency acknowledged that they have read and understood the mission of the public authority? The members of the Agency have reviewed the mission statement and approved the same by resolution on January 10, 2023.

2. Who has the power to appoint the management of the public authority? The members of the Agency appoint the Executive Director of the Agency, as well as the other staff of the Agency.

3. If the members appoint management, do you have a policy you follow when Appointing the management of the Agency? The Agency looks to the residents of the Town to find appropriate candidates for management.

4. Briefly describe the role of the members and the role of management in the implementation of the mission. The Mission of the Agency was developed by the members through much consideration and discussion. The members of the Agency act as an independent body of members who all take their role and responsibility as Agency members very seriously. They consider the facts and implications when making determinations. The members make policy decisions, and look to management to implement said policy. All decisions to grant financial assistance by the Agency ("Project Approvals") require approval of the members; in those cases, the members request insight and recommendations from management; however all final decisions on Project Approvals reside with the voting members of the Agency.

5. Have the members acknowledged that they have read and understood the responses to each of these questions? All members participated in the drafting, presentation for discussion, and approval of these responses.