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Montgomery
INDUSTRIAL DEVELOPMENT AGENCY

ANNUAL
ACCOMPLISHMENTS
REPORT

2023



EXECUTIVE SUMMARY

In 2023, The Town of Montgomery IDA staff included full-time Executive Director Felicia Kalan and Secretary Lauren Rowley. IDA Board Members were Town of Montgomery residents Jeffrey Crist (resigned October 2023), John Dickson, Tom Jones, Matt Stoddard, Robert Santo, George Declue, Stacey Hillman (appointed October 2023) and Jose Hernandez (appointed October 23). In October of 2023, John Dickson became the newly appointed Chairman of the Town of Montgomery IDA.

In 2023, the Board and Executive Director worked to enhance economic development, and also secured and reviewed the following applicants including Milk Factory LLC, KCE Energy NY 2, Hawkins Drive LLC, 29 Grant Street LLC, City Winery, and Hudson Valley Country Club LLC. In October 2023, the Hudson Valley Country Club LLC was officially approved for sales tax exemptions at the existing Lake Osiris golf course as an adaptive reuse project- the only new IDA project approved in 2023. A full list of projects can be found on our website at montgomeryida.com/projects.

Our efforts have focused on attracting our niche of agritourism related projects and helping current businesses expand. There is a need for infrastructure updates in the Town of Montgomery to attract larger manufacturing projects, several projects were lost due to this ongoing issue. The Town of Montgomery and Village of Montgomery are contracted to receive additional sewage and water capacity from the Village of Maybrook. Moreover, there is a clear need for senior housing and more housing-related projects in general, including mixed-use developments.

NUMBER OF FULL-TIME JOBS RETAINED OR CREATED

2,122

SUPPORTING LOCAL ECONOMIC GROWTH AND JOB GROWTH IN THE TOWN

- To date with current IDA PILOT projects, the MIDA has aided in creating **2,122 jobs through attraction efforts.**
- Working to identify potential developers that would be good partners with the Town
- 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 and implemented framework for an IDA Fellowship Program to support local workforce development initiatives; **hosted first IDA fellow Thomas Wutz in summer of 2023**
- Spent several months aiding in attracting an adaptive reuse project for the declining Lake Osiris Country Club; received an application from **Hudson Valley Country Club, LLC that will bring 19 additional jobs to the Town of Montgomery and the application was approved in September 2023.** Also received application for 29 Grant Street adaptive reuse project, however the developer decided to hold on moving forward until receiving planning board approvals. Hawkins Drive, LLC is also pending for a sales tax exemption.
- Continued IDA Board review of the following applications for TMIDA PILOT benefits: Hawkins Drive, LLC, KCE NY 2, LLC and Milk Factory, LLC set to be approved in January 2024. The Town of Montgomery Board members voted on a 12-month moratorium for battery storage facilities on November 28, 2023, the IDA cannot take approval action on the KCE NY 2, LLC project until the moratorium is lifted in December 2024.
- Ongoing conversations with the following projects to attract to the Town of Montgomery. Our efforts have focused on attracting our niche of agritourism-related projects and helping current businesses expand. There is a need for infrastructure updates in the Town of Montgomery to attract larger manufacturing projects, several projects were lost due to this ongoing issue. The Town of Montgomery and Village of Montgomery are contracted to receive additional sewage and water capacity from the Village of Maybrook. Moreover, there is a clear need for senior housing and more housing-related projects in general, including mixed-use developments.
 - Dinosaur Park and Treetop Zipline- Neil Gold, City Winery expansion, Angry Orchard expansion, Senior Housing Project- Chris LaPorta, 29 Grant Street, LLC- Israel Miller, BayWare Solar Project- Chris Lazinski, RDM Spec Projects- attracting final tenants.

SUPPORTING REGIONAL ECONOMIC GROWTH

- Attended NYATEP and NYSEDC 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
- Attended Fall OC Economic Development Summit- SUNY Orange
- Attended Orange County Partnership Networking Breakfasts and monthly events
- Relationship building with key stakeholders

IDA COMMUNITY PROJECTS & COMMUNITY ENGAGEMENT

- Weekly social media engagement with the Town of Montgomery community in partnership with Acquisitions Marketing; attended various community events and speaking engagements to continue to promote the Town of Montgomery IDA as a positive force in the community for economic growth
- Aided in grant research and connections for the Town of Montgomery Pedestrian Park and walking path concept in partnership with a local community group led by Marc Devitt that will continue to spur economic development in the Village of Montgomery.
- 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
- Regular meetings with Town and Village elected officials and the Valley Central School Superintendent
- Sponsored various community events including an Economic Development Summit in January of 2022 in partnership with the Business Council; also sponsored the Tri-Montgomery Triathlon to help promote health and wellness and attract bike tourist visitors.

ORGANIZATIONAL UPDATES

- Made branding and technical updates to the Town of Montgomery IDA website: www.montgomeryida.com
- Former Chairman Jeff Crist resigned and helped facilitate interviews for new board members; Stacey Hillman and Jose Hernandez were officially appointed as new IDA members in October 2023 and aided in onboarding the new members.
- Continued to livestream all public meetings
- Former Chairman Jeffrey Crist and Executive Director attended the EDC Conferences and organizational trainings
- In May, received an at-length request from the ABO to update the website with required documents and information that had not been previously done by the Montgomery IDA. Upon making updates, received favorable response from the ABO of fulfilled requirements.
- Policy updates: Mission Statement, FAQ, IDA Fee Schedule, Adopted Uniform Tax Exemption Policy 4-11-23, Debit Card Policy, Travel and Discretionary Funds Policy: <https://montgomeryida.com/resources/>

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 Board members of the Agency appoint the Executive Director 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 Board Members and Town Board to find appropriate candidates for management through a rigorous application process.

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 will participate in presentation for discussion, and approval of these responses at our December 12, 2023 board meeting.