



Mission: The mission of the County of Lewis IDA is to stabilize, strengthen and grow communities through strategic community partnerships, innovative incentive programs, responsible leverage of our financial resources and thoughtful policy development to advance economic growth and a brighter and more inclusive future for all.

- I. Call to Order 8:15AM
- II. Privilege of the Floor
- III. Minutes for February 6, 2025 Board Meeting
- IV. Financial Reports for January 2025
- V. Loan Fund Status Report as of December 31, 2024
- VI. Items for Approval 8:30AM
 - I. Backyardigans deposit refund
- VII. IDA Report
- VIII. Correspondence
- IX. Items for Discussion 9:00AM
 - I. Harrisville Community Bank Building
 - II. Mandeville Studios
 - III. "Attract What We Want" Strategy – Camoin Proposal
- X. Executive Session
 - I. Contract Negotiations
- XI. Adjournment 9:45AM

Next Meeting:

LCIDA Regular Board Meeting – April 3, 2025 – 8:15am – LC JCC Education Center (Boardroom)
Governance Committee – April 3, 2025 – 9:45am – LC JCC Education Center

Board Members Present: Joe Lawrence, Jerry Haenlin, Herb Frost, McKenzie Lehman, Candace Randall (8:26am), Jessica Moser (8:41am)

Others Present: Brittany Davis, Trish Michael, Cheyenne Steria, Kaylee Tabolt

I. Call to Order

- a. Chairman Joseph Lawrence called the meeting to order at 8:18am.
- b. Chairman Joseph Lawrence read the County of Lewis IDA Mission Statement.

II. Privilege of the Floor

III. Minutes

- a. The previously distributed **January 2025 Regular Board Meeting Minutes** were reviewed by the Board.
 - i. A motion to approve of the **January 2025 Regular Board Meeting Minutes**, which includes the profit and loss statement, and the balance sheet.
 1. A motion to approve of the **January 2025 Regular Board Meeting Minutes** was made by Jerry Haenlin and seconded by Herb Frost. All present were in favor and motion carried.

IV. Financial Reports

- a. Trish Michael discussed notables on the **December 2024 LCIDA Financial Report**, which includes the profit & loss statement and balance sheet. Staff clarified that "Other Assets" are mostly future PILOT fees.
 - i. A motion to approve of the LCIDA Financial Reports was made by Jerry Haenlin and seconded by McKenzie Lehman. All present were in favor and motion carried.

V. Items for Approval

- a. 2025-2026 Budget
 - i. Joe Lawrence noted that the IDA budget has to be submitted with PARIS reporting so this discussion is necessary ahead of the fiscal year. Cheyenne Steria noted rental and financing income, where the interest is income, for the following projects: BRVN Installment Sale, Trinity Building Lease/Installment Sale Interest, Brewing Equipment Installment Sale Interest, Snow Ridge Installment Sale Interest, and the 2025 Snow Ridge Groomer Installment Sale Interest. Cheyenne Steria also noted expenditures including the Naturally Lewis, Inc. Staff Services Contract, and property and site development and consultants,

which are also seen as non-operating expenditures in the "Capital Asset Outlay" line. Brittany Davis added that consultants are essential for property and site development and their alignment with the IDA; Brittany Davis asked that the Board considers increasing the budget for consultants to \$100,000. The Board discussed where the additional \$50,000 would come from; Cheyenne Steria and Brittany Davis noted that property and site development have not used their full budgets in the past so this money could come from reserves. The Board discussed the sustainability of this funding if we pull from reserves; the Board discussed the return on investment for promoting financial literacy in the business community; if a business is tooled for success, they will come to the IDA for incentives when they are prepared to scale-up. Joe Lawrence discussed "programs versus projects" and the IDA's role in investing in community where the return is through investments to the community – it is not a dollar-for-dollar return on investment. Joe Lawrence added that the IDA is not doing its job if it is sitting on money. Trish Michael added that in the first year, staff can develop metrics to track return on investment for financial literacy efforts. Cheyenne Steria transitioned to discussing the three year budget of the IDA and the need to analyze

1. A motion to approve the **Proposed 2025–2026 Budget**, with the revision of increasing the line for consultants, with the intention of improving financial literacy across the Lewis County business community and our clients, to \$100,000, was made by Jerry Haenlin and seconded by McKenzie Lehman. All present voted in favor and motion carried.

VI. IDA Report

- a. Brittany Davis noted updates on community partnerships, policy development, proactive and strategic incentive programs, leveraging financial resources, and organizational updates. Herb Frost complimented Cheyenne Steria on the AES Solar discussion with key stakeholders in January. Cheyenne Steria informed the Board of the \$2 billion potential Hydrostor energy storage project for development in the Town of Croghan or the Town of Watson. Cheyenne Steria added that a 1% fee on their investment will allow the IDA to think creatively with their finances. The Board discussed that the project, in addition to financial investment, would bring 700 temporary jobs and

40 permanent jobs to the community; the Board still has questions but there is an energized potential while the project is in the discussion phase.

VII. Items for Discussion

a. Harrisville Bank Building

i. Cheyenne Steria noted that there is an accepted purchase offer on the Harrisville Bank Building for the appraised value; the IDA has 30 days to complete an inspection.

1. A motion to approve the offer to purchase contingent upon a successful inspection was made by Herb Frost and seconded by Jerry Haenlin. All present voted in favor and motion carried.

a. Note: Jessica Moser is connected to Community Bank, but is not associated with the Harrisville Branch or their real estate department.

b. Black River Valley Natural

i. Brittany Davis provided the Board with updates from the last board meeting on the Black River Valley Natural projects. Brittany Davis presented Installment Sale options for the Board to discuss; the Board would like to purchase new equipment as there is an inherent risk with purchasing used equipment. Jerry Haenlin suggested tabling this discussion until the March board meeting when there are more board members present. Jessica Moser noted the learning-process of the previous "asset" versus "equipment" installment sale and the fact that the Board is not interested in another brewery equipment situation; the resale value of a less niche piece of equipment decreases risk. Brittany Davis questioned if the Board would be open to a deferred payment on an Installment Sale; Herb Frost suggested that deferred payments for six months with a lower interest rate and a reevaluation after six months.

c. Hamilton County IDA Housing Example

i. Brittany Davis noted that Hamilton County shared their workforce housing project with staff for benchmarking. The Hamilton County IDA purchased tiny-home cabins on a Sale-Leaseback Agreement for temporary housing. The Board discussed the opportunity to support the hospital or energy projects that have traveling employees; staff will connect with major employers that may benefit

from a project similar to this, including the Lewis County Health System, and Kraft.

d. Business Park

- i. Cheyenne Steria presented a site in Lyons Falls as a potential site for the Lewis County Business Park. With a topography map and a slope map, Cheyenne Steria noted infrastructure, recreational assets, and potential for this site for the Board's discussion; there are approximately 15 acres for development. Cheyenne Steria asked if the Board would like to proceed with an option to purchase agreement for this site. Jerry Haenlin noted that with a transmission line and a natural gas line there are very strict land use regulations and a right of way of 100 feet on each of those assets separately. Herb Frost noted concerns about drainage with the slope of this land, while knowing that it has land use restrictions. The Board discussed other potential sites for the business park; land on Route 26 in Denmark and the former Geiterdone site were identified as potential project sites. Cheyenne Steria questioned if the Board would like staff to request an option to purchase on this Lyons Falls site. Herb Frost declared that this Lyons Falls site is not ideal for development; the Board unanimously agrees. The Board would like staff to explore other options discussed, with consideration for the municipal boards and collaborative perspectives that would be partners in development.

e. McRez Meat Packing Update

- i. Brittany Davis provided the Board with an update on the McRez Meat Packing project; the property, which was sold with the Town's understanding that a project would not be fought against, has still not moved past Site Plan Approval. Candace Randall provided that from her conversations with the legal counsel of Town of Lyonsdale they would be approving the project at their next meeting, however, an individual board member has informed her of their reenergized agenda to halt this project and cease progress in their community. Brittany Davis added that the developer's attorney has been one of the only individuals able to impact the Board to further progress. The Board discussed legal timeframes and potential legal proceedings against the Town of Lyonsdale.

1. A motion to enter executive session to discuss attorney privileges regarding the McRez Meat Packing project was made by Herb Frost and seconded by Jerry Haenlin. All present voted in favor and motion carried.
2. A motion to exit executive session was made by Herb Frost and seconded by Jerry Haenlin. All present voted in favor and motion carried.

VIII. Adjournment

- a. A motion to adjourn was made at 9:48am by McKenzie Lehman and seconded by Jerry Haenlin. All present voted in favor and motion carried.

Lewis County IDA

Expenses by Vendor Summary

January 1 - February 2, 2025

	TOTAL
Barclay Damon	198.00
Beaver River Central School	12,992.89
Carthage Central School	10,091.23
Copenhagen Central School	207,553.62
County of Lewis	395,600.51
Lowville Central School	186,787.25
Mount Vernon Fire Insurance Company	340.70
Naturally Lewis Inc.	68,679.27
South Lewis Central School	4,679.22
Town of Denmark	9,857.25
Town of Harrisburg	82,207.01
Town of Lowville	88,666.18
Town of Martinsburg	7,813.69
Town of New Bremen	7,417.81
Town of Pinckney	7,023.01
Not Specified	536.00
TOTAL	\$1,090,443.64

Lewis County IDA

Balance Sheet

As of February 2, 2025

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
Cash-Petty Cash	50.00
IDA CD 1M - x0868	1,003,450.19
IDA CD 500K - x0867	501,854.71
IDA Checking x1214	118,179.22
IDA Micro Rev Loan x2054 CLOSED	0.00
IDA Money Market x1248	709,739.56
IDA USDA Loan Fund x1511	99,856.28
NYCLASS	2,886,369.78
Total Bank Accounts	\$5,319,499.74
Accounts Receivable	
1101 Account Receivable	2,502,047.91
Total Accounts Receivable	\$2,502,047.91
Other Current Assets	\$310,691.59
Total Current Assets	\$8,132,239.24
Fixed Assets	\$0.00
Other Assets	\$478,548.27
TOTAL ASSETS	\$8,610,787.51
LIABILITIES AND EQUITY	
Liabilities	\$ -0.33
Equity	\$8,610,787.84
TOTAL LIABILITIES AND EQUITY	\$8,610,787.51

Lewis County IDA

Profit and Loss

January 1 - February 2, 2025

	TOTAL
Income	
3022 Interest Income	
3020 IDA - Bank Accounts Interest	14,641.69
3091 IDA - Installment Sale Interest Income	1,290.49
Total 3022 Interest Income	15,932.18
3076 PILOT Payments passthrough	3,150,584.90
Revenues-Fee	0.00
Total Income	\$3,166,517.08
GROSS PROFIT	\$3,166,517.08
Expenses	
3074 Economic Development Expense	68,679.27
3075 Agency Exp	198.00
8001 Bank Fee	36.00
Occupancy	340.70
Total Expenses	\$69,253.97
NET OPERATING INCOME	\$3,097,263.11
Other Income	
1167-01 2nd Place Occupancy Payments	1,382.90
Total Other Income	\$1,382.90
NET OTHER INCOME	\$1,382.90
NET INCOME	\$3,098,646.01

LOAN FUND STATUS REPORT
As of December 31, 2024

	<u>RBE</u>	<u>USDA</u>	<u>TOTALS</u>	<u>PENDING</u>	<u>AVAILABLE TO LOAN</u>
Account Balance	\$0.00	\$98,452.47	\$98,452.47	\$0.00	\$98,452.47
Receivable	\$0.00	\$0.00	\$0.00		
Totals	\$0.00	\$98,452.47	\$98,452.47		

IDA - INSTALLMENT PAYMENT AGREEMENTS

<u>Business Name</u>	<u>Start Date</u>	<u>Type</u>	<u>Amount</u>	<u>Balance</u>	<u>0-30 days</u>	<u>31-60 days</u>	<u>> 60 days</u>
2nd Place Beer - Equipment	1/1/2025	Equipment	\$133,833.00	\$133,833.00			
2nd Place Beer - Property	1/1/2025	Property	\$100,000.00	\$100,000.00			
Black River Valley Natural, LLC	1/1/2019	Equipment	\$22,000.00	\$10,889.22	deferred		
Snow Ridge Resort LLC	9/1/2021	Equipment	\$135,000.00	\$97,231.82			
2nd Place Beer - Occupancy Payments	10/1/2024	Occupancy	\$3,712.58				

OFFER TO PURCHASE

TO: **COMMUNITY BANK, NATIONAL ASSOCIATION**, 5790 Widewaters Parkway, DeWitt, New York 13214 the holder of the fee simple title to the Property described below (the "Seller")

FROM: **COUNTY OF LEWIS INDUSTRIAL DEVELOPMENT AGENCY**, 7551 South State Street, Lowville, New York 13367 (the "Purchaser")

Property Under and subject to the terms and conditions of this Offer to Purchase, Purchaser offers to purchase from Seller the fee simple title to the parcel of land located at **14216 State Street in the Town of Diana, Lewis County, New York, being Tax Map Parcel Number 013.14-08-16.000**, consisting of a 1,056+/- square foot single-story building, situated on 0.18+/- acre of land, together with all right, title and interest of the Seller, if any, in and to (i) the highway, and all gores and strips of land, easements, rights and rights of way, adjacent to or used in connection with the Property, and (ii) all improvements located on the Property, including fixtures and equipment attached to the Property.

Notwithstanding anything to the contrary herein, Seller reserves the right to remove any and all banking trade fixtures, including, but not limited to, security equipment, ATM machines, deposit boxes, and vaults, prior to Closing (hereinafter defined).

The land, improvements, fixtures, equipment and other rights and interests enumerated above and to be sold and conveyed pursuant to the Contract are hereinafter collectively referred to as the "Property."

Purchase Price The purchase price for the Property shall be **Fifty Thousand and 00/100 Dollars (\$50,000.00)** payable as follows:

Deposit **\$5,000.00** deposited with Bond, Schoeneck & King, PLLC, the attorneys for the Seller (the "Escrow Agent"), to be held until this Offer to Purchase is accepted, at which time it shall become part of the purchase price for the Property or returned if this Offer to Purchase is not accepted (the "Deposit"); and

Balance **\$45,000.00** in certified funds at Closing (defined below).

Effective Date "Effective Date" shall mean the date that Seller executes and accepts this Offer to Purchase.

Searches, Taxes, Easements, Restrictions, Zoning, etc. Seller shall deliver to Purchaser or to its attorneys, at least fifteen (15) days before Closing, an up-to-date forty-year (40) abstract of title, a current survey of the Property dated as of October 4, 2023, and ten-year searches or tax receipts showing the Property to be free and clear of all liens and encumbrances, except easements benefiting the Property and municipal or utility easements adjacent to

the Property boundaries. The Purchaser shall be responsible for continuing such searches to and including the date of Closing and the cost thereof.

- Closing Deed Transfer of title (the "Closing") is to be completed at the office of Purchaser's attorney, or at a mutually agreeable location, or by mail, on or about twenty (20) days after the expiration of the Inspection Period at which time Seller shall convey to Purchaser by a bargain and sale deed with covenant against grantor's acts, good and marketable title to the Property, free and clear of all liens and encumbrances, excepting building and use restrictions, utility easements benefitting the Property, easements or encumbrances that do not materially and adversely affect Purchaser's intended use of the Property, and real estate taxes or assessments which are a lien but are not yet due and payable. Seller will pay the transfer tax and the fee to file the TP-584 Form. Purchaser will pay for the recording of the deed and for the filing of the RP-5217 Form and be responsible for recording the deed.
- In the event Seller is unable to deliver title as required herein, either party shall have the right to terminate this Offer to Purchase, and upon such termination, Seller shall return the deposit to Purchaser.
- Adjustments Real estate taxes and special assessments shall be pro-rated and adjusted as of Closing.
- Property Condition Purchaser understands and acknowledges that Seller makes no representation or warranties, express or implied, as to the physical or environmental condition of the Property (including personal property, if any), except as expressly set forth herein, the Property being sold **AS-IS**.
- Possession Seller shall deliver possession of the Property to Purchaser at Closing upon Seller's receipt of the Purchase Price less adjustments, free and clear of all tenants or other occupants.
- Risk of Loss The risk of loss or damage to the Property by fire or other causes until the delivery of the deed is assumed by Seller.
- Broker Seller and Purchaser warrant and represent to each other that no broker or agent was instrumental in bringing about this Offer to Purchase except for Cushman & Wakefield Pyramid Brokerage Company. Any commissions arising out of this sale shall be paid by Seller. Purchaser and Seller shall indemnify the other for a breach of the foregoing representations by such party. This section shall survive the Closing.
- Notices All notices required under this Offer to Purchase shall be in writing and may be delivered personally, with receipt acknowledged, or sent by certified or registered mail, return receipt requested, postage prepaid, or sent via national, reputable overnight carrier, or by scanning and emailing, addressed to the party to be notified as follows. Notice given by or to the attorneys for the parties pursuant to this paragraph shall be deemed properly given:

To Seller: Community Bank, N.A.
Attn: Albert Giannino
5790 Widewaters Parkway
DeWitt, New York 13214

With a copy to: Bond, Schoeneck & King, PLLC
Attn: Kevin Pole
One Lincoln Center
Syracuse, New York 13202

To Purchaser: County of Lewis Industrial Development Agency
7551 South State Street
Lowville, New York 13367

With a copy to: Campany, McArde & Randall, PLLC
Attn: Candace L. L. Randall, Esq.
5423 Shady Ave.
PO Box 311
Lowville, NY 13367

Persons Bound This Offer to Purchase, when accepted, shall constitute a binding contract of purchase and sale and shall be binding upon Purchaser, Seller and their respective successors and assigns.

Assignment Purchaser may not assign its rights and obligations under this Contract without the prior written consent of Seller. In the event Seller consents to such assignment, Purchaser shall remain obligated notwithstanding any such assignment. Notwithstanding the foregoing, Purchaser may assign this contract to an entity owned or controlled by it; provided, however, that Purchaser shall remain obligated notwithstanding any such assignment.

Counterparts This Offer to Purchase may be executed in multiple counterparts, each of which shall constitute an original, and all of which when taken together shall constitute one original. Delivery by facsimile or in a PDF transmission of a counterpart of this Offer to Purchase as executed by the parties making the delivery shall constitute good and valid execution and delivery of this Offer to Purchase for all purposes.

Contingencies Purchaser may complete a physical noninvasive inspection of the Property (the "Inspection") within thirty (30) days of the Effective Date (the "Inspection Period"). In the event the Inspection discloses that the Property requires repairs in excess of \$3,000.00, as determined by a quote from a professional, Purchaser will have the option to either (i) waive this contingency and proceed to Closing, or (ii) terminate this Offer to Purchase by written notice delivered to Seller within

the Inspection Period, in which event the Deposit will be immediately refunded to the Purchaser.

This Offer to Purchase is not contingent upon Purchaser obtaining financing or mortgage approval, or upon any other condition or occurrence, except as stated hereinabove.

[Signature pages to follow]

OFFER

Purchaser has executed this Offer to Purchase as follows.

Dated: 2/21, 2025

**COUNTY OF LEWIS INDUSTRIAL
DEVELOPMENT AGENCY**

By: Joseph R. Lawrence
Name: JOSEPH R. LAWRENCE
Title: IDA BOARD CHAIR

ACCEPTANCE

The undersigned hereby accepts this Offer to Purchase and agrees to sell the Property at the price and upon the terms and conditions set forth in this Offer to Purchase.

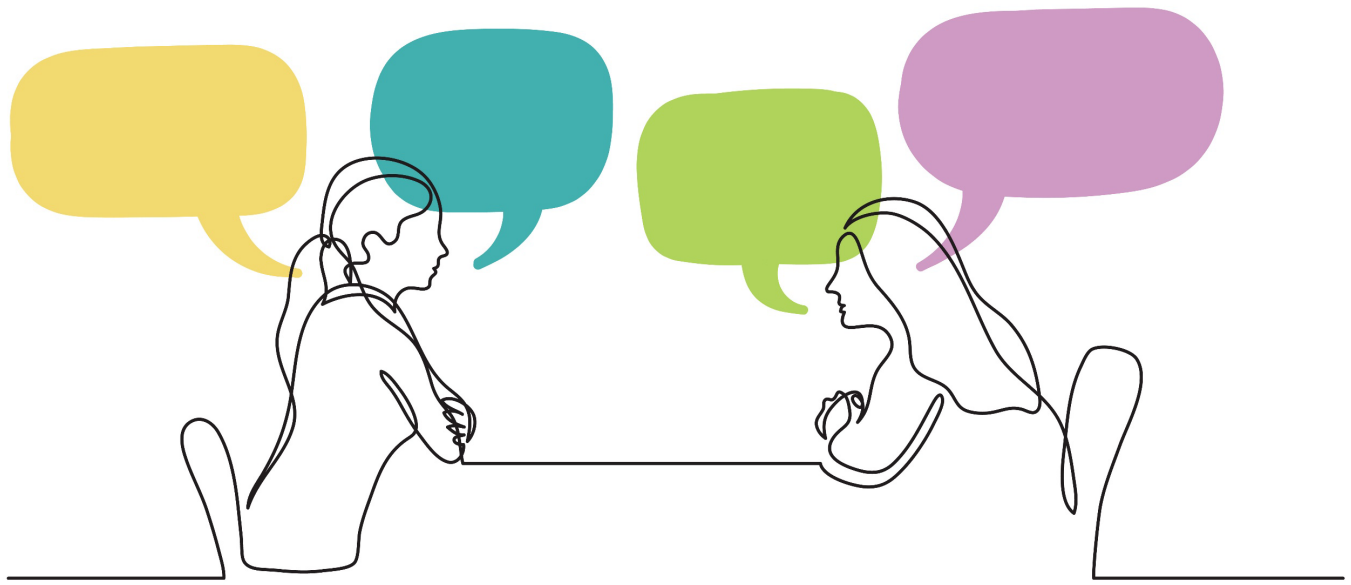
Dated: _____, 2025

COMMUNITY BANK, NATIONAL ASSOCIATION

By: _____

Name: Albert Giannino

Title: VP, Director of Corporate Real Estate



PROPOSAL FOR
"Attract What We Want"
Strategy

Naturally Lewis

SUBMITTED TO:

Brittany Davis
Executive Director
Naturally Lewis

Email: brittany@naturallylewis.com

February 2025

PRESENTED BY:



518-899-2608

www.camoinassociates.com

CONTENTS

SCOPE OF WORK.....2

BUDGET & SCHEDULE.....5

ABOUT CAMOIN7





February 26, 2025

Dear Brittany,

We understand that Naturally Lewis is seeking a study to identify attraction opportunities that pertain to Lewis County’s existing business mix, unique entrepreneurial culture, and standing within the regional economy. Camoin Associates is honored to have contributed to your work through our partnership on redevelopment projects in the County, and last year’s keynote at your annual conference. We are deeply passionate about your mission and would welcome the opportunity to collaborate again.

Our team has decades of experience analyzing economic development trends and developing successful strategies, including experience across Upstate New York for local, regional, and industry clients. From this experience, we have learned what it takes to succeed. For this project, we will bring our industry intelligence and strategy expertise to develop custom solutions fitting your assets, market environment, and overall economic strategy. Our staff are also regular contributors to national professional publications on industry, technology, and innovation, ensuring we have the latest knowledge on the factors impacting your local economy and key industries.

What is Needed to Succeed?

 <p>Existing Industry</p> <ul style="list-style-type: none"> • Defining and knowing your niche • Aligning opportunities and addressing critical gaps • Building connections and synergies with other sectors and supply chains 	 <p>Innovation & Entrepreneurship</p> <ul style="list-style-type: none"> • A strong innovation ecosystem – R&D, Tech Transfer, Incubators and accelerators, networks • Organizing, collaborating, and knowing your role within the ecosystem • Preparing for future growth by understanding emerging opportunities • Targeted marketing that focuses on subsectors and geographies 	 <p>Talent and Workforce</p> <ul style="list-style-type: none"> • Understanding critical occupations and skills • Recognizing the importance of STEM • Assessing capacity to delivering a responsive and consistent system • Determining potential to upskill and reskill resident/employees 	 <p>Real Estate, Sites and Infrastructure</p> <ul style="list-style-type: none"> • Understanding the variety of critical site and space needs • Having space for companies at all stages of growth • Competing with other markets
--	---	--	---

We are confident that the scope of work below will meet your needs. Should you have any questions or want to make any adjustments, please let us know.

Sincerely,

Christa O. Franzi

Christa O. Franzi, CECD

Vice President + Director of Entrepreneurship

Alex Tranmer

Alex Tranmer, CECD

Director of Industry & Workforce

SCOPE OF WORK

1 | KICKOFF AND PROJECT MANAGEMENT

The Camoin Associates approach to project management prioritizes communication, frequent check-ins, and ongoing collaboration with our client. This is done through regularly scheduled project management calls between our project manager and the client's representatives. We will work directly with Naturally Lewis and advise your team based on research findings.

The project kickoff will be conducted as a video conference. The purpose of the meeting will be to examine the proposed methodology in detail to ensure the approach will meet the needs of the project team and its stakeholders and to conduct an initial discussion during which we will identify information needs, project timeline, site visit schedule, etc.

- **Industry definition and assets:** Develop an understanding of Lewis County's key industry sectors. This includes issues Naturally Lewis wants to consider, such as existing assets in the county and possible industry NAICS codes. We will also discuss what data and information Naturally already collects on the sectors, along with a discussion of related projects and assets.
- **Stakeholders:** Brainstorm those individuals within the area and at private entities who need to be interviewed and engaged for project success.
- **Define success:** Discuss the ultimate objectives of this process and align the desired outcomes of Naturally Lewis.

RESULT | A project management and research and engagement plan to ensure effective progress and outcomes of the process.

2 | MARKET OPPORTUNITIES & CHARACTERISTICS

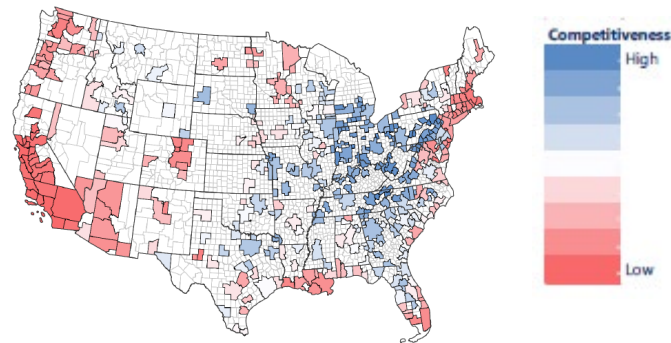
Exiting Industry Base in Lewis County

Using the definitions developed during the prior targeted industry analysis, kickoff meeting, and follow-up conversations, Camoin Associates will use best-in-class data sources and our proven research and analysis techniques to develop a snapshot of Lewis's current key sectors (e.g. agriculture, outdoor recreation, food and beverage, niche manufacturing, and digital entrepreneurship), including establishments, jobs, wages, and output.

Geographic Competitiveness Analysis

Once the key industries are identified, we will conduct our Geographic Competitiveness Analysis (GCA) to assess Lewis County's competitiveness in terms of the attraction of businesses in the key industries, relative to similar counties throughout the US. Our team will select up to 10 factors that are "essential" or "important" to companies in the site selection process for the key industries. These factors might include workforce availability and labor costs, real estate and utility costs, transportation networks, proximity to suppliers and markets including FDI Opportunities, business environment, cost of living, and others. Examined together, these metrics will indicate which regions Lewis County is competitive with.

Sample map showing relative competitiveness of metros nationally for attraction of a particular industry cluster:



Innovation, R&D, and Entrepreneurship

Growth opportunities within the key sectors are highly driven by innovation, research and development, commercialization, and entrepreneurship, all of which typically involve public and private institutions, entrepreneurs, and existing companies. We will assess data on:

- **Business Dynamics** – Data to contextualize Lewis County’s overall performance on entrepreneurship with indicators of business performance such as establishment births, establishment exits, churn rate, firm age, etc.
- **Self-employment** – Provides insights into the startup pipeline, by sector and sub-sector overall and within the key industry sectors.
- **Microbusiness Online Activity** – The presence, performance, and impact of online micro businesses (ventures with less than 10 employees).

This analysis will help our team illustrate the role of entrepreneurship in Lewis County’s overall economy and key sectors and trends in entrepreneurship activity.

RESULT | The market opportunity and characteristics summary will provide strategic market intelligence around the factors driving the key industries and the cross-sectors with the greatest areas for growth in the region. Data will be displayed to demonstrate Lewis County’s context in the industries, and the narrative will highlight key findings and connections to potential strategies.

3 | STAKEHOLDER INTERVIEWS AND MARKET TESTING

To validate industry data and gauge reactions to market opportunities that emerged in the data, we will supplement data analysis with strategic 1-1 and small group conversations with private and public sector stakeholders. Categories of stakeholders are likely to include small, medium, and large businesses across the value chains explored in Task 1. Outreach is also likely to include entrepreneurs, innovation partners, education partners, regional economic development partners, and workforce professionals. This will help us evaluate the perception and reality of the economic development ecosystem.

- **Stakeholder Interviews** - We anticipate conducting about 15 interviews with key stakeholders to gain perspective on strengths and challenges. We anticipate conducting these interviews 100% remotely through the stakeholder(s) preferred platform. We will look to Naturally Lewis to workshop an initial list of stakeholders with our team and once the list is confirmed, to make email introductions as necessary.

- **Focus Groups** – In addition to the 1:1 interviews, we will partner with Naturally Lewis to facilitate a series of stakeholder round tables with important stakeholder groups. These small group meetings may be organized by topic or location in the county, as appropriate. Camoin will provide a facilitation protocol detailing the purpose and information needs for each discussion and rely on the Naturally Lewis team to implement the engagement plan.

RESULT | The stakeholder interviews will provide a more nuanced understanding of the challenges and opportunities in Lewis County. We will summarize the findings by theme and incorporate them into the final report.

4 | COMPETITIVENESS REPORT

The findings from the data analysis and stakeholder engagement process will be summarized in a brief report, which will include a competitiveness matrix that ranks how Lewis County currently performs on the top considerations for business attraction. Recognizing that different-sized businesses have different priorities for location decisions, the matrix will rank each factor from the perspective of the business by stage: 1: Startup, 2: Scaling Up, 3: Maturity, and 4: Renewal or Decline, as well as from the perspective of businesses within the county's key sectors. Each site selection factor will be evaluated based on quantitative data and qualitative insights.

RESULT | The competitiveness matrix will provide a clear and concise snapshot of Lewis County's strengths and weaknesses for attracting business and economic investment.

5 | ATTRACTION ACTION PLAN (FUTURE OPTIONAL PHASE)

Building on the findings from the prior tasks, Camoin Associates will develop a targeted, action-oriented strategy that prioritizes the most promising opportunities for business and investment attraction in Lewis County. The Action Plan will serve as a roadmap for Naturally Lewis and its partners, outlining specific initiatives, key stakeholders, and implementation steps to attract the types of businesses and investments that best align with the county's goals.

The Action Plan will include:

- **Strategic Priorities** – Identification of the most impactful opportunities and challenges based on data analysis, stakeholder input, and market trends. These will align with Naturally Lewis' vision and regional economic development goals.
- **Tactical Recommendations** – A set of clearly defined strategies and initiatives designed to leverage strengths, address gaps, and support business retention, expansion, and attraction. Recommendations will be actionable, practical, and tailored to the county's unique assets and resources.
- **Implementation Framework** – A phased approach to executing the Action Plan, including:
 - Short-term (0-12 months), medium-term (1-3 years), and long-term (3+ years) actions
 - Roles and responsibilities of Naturally Lewis and its partners
 - Potential funding sources and partnership opportunities
 - Key performance indicators (KPIs) to measure progress and impact

Camoin Associates will work closely with the Naturally Lewis team to ensure the recommendations are realistic, aligned with local capacity, and structured to drive measurable results. To do this, we will conduct a work session with the Naturally Lewis team to review findings, answer questions, and provide any clarifications.

RESULT | A comprehensive Attraction Action Plan that provides Naturally Lewis with a clear and executable roadmap for advancing economic development priorities in Lewis County. The plan will be designed to be flexible and adaptable to changing economic conditions and emerging opportunities.

BUDGET & SCHEDULE

Tasks 1–4 constitute a defined initial phase resulting in a Competitiveness Report, while Task 5: Attraction Action Plan is an optional phase that Naturally Lewis may pursue, if desired, in the future. To complete the scope of work outlined in the RFP for Tasks 1-4, we propose a total project fixed fee of \$38,330. This includes our professional fees (staff time).

Tasks	Fee
1. Kickoff and Project Management	\$1,135
2. Market Opportunities & Characteristics	\$18,775
3. Stakeholder Interviews and Market Testing	\$8,000
4. Competitiveness Report	\$10,420
Total Fee Initial Phase	\$38,330
5. Attraction Action Plan (Optional future task)	\$8,425
Total	\$46,755

The proposed scope of work does not include onsite visits by Camoin staff. If a site visit is requested, the cost for a one-day visit by two senior Camoin staff members would be \$3,500, including staff time and travel expenses.

SCHEDULE

Our team can complete the outlined scope of work within 4 to 5 months. The timeline will be primarily influenced by the scheduling, conducting, and synthesizing interviews and focus groups.

HOURLY RATES

Hourly rates for additional work or site visits requested by the client are as follows:

President / Sr. Vice President	\$350
Vice President / Director	\$275
Sr. Analyst & Sr. Project Manager	\$200
Analyst & PM	\$155
Travel: (all)	\$95

NEEDS TO ENSURE PROJECT DELIVERY

We will collaborate closely with the Naturally Lewis team to ensure seamless project delivery within the designated timeline and budget. Your roles and responsibilities will include:

- Recommend and provide existing reports, data, and background materials to review.
- Develop a list of stakeholders for focus groups and interviews and make introductions where appropriate.
- Lead planning for all focus groups, including scheduling, securing meeting spaces, sending invites, planning tours, providing refreshments (if desired by the client), etc.
- Promptly synthesize Naturally Lewis-led focus groups and provide written summaries of these discussions.
- Promptly review and provide written feedback on draft deliverables from the Camoin team.
- Participate in remote work sessions to review and refine deliverables.
- Designate a project manager to meet with Camoin's project manager bi-weekly throughout the duration of the project to review the status, schedule, and other project needs.

ABOUT CAMOIN

▶ OUR BACKGROUND

Camoin Associates was founded by Robert Camoin in 1999 with a commitment to improving the economic well-being of communities. Along the way, we've completed over 1,800 projects in 46 states and the US Virgin Islands and helped advance prosperity for entrepreneurs, small businesses, multinational corporations, rural villages, cities, counties, and metropolitan regions. Our work has been featured in news articles and broadcasts produced by highly respected national media outlets including the *Wall Street Journal*, National Public Radio (NPR), and CNBC. Today we are 25 highly skilled professionals who work diligently to analyze and understand data, build consensus, and creatively manage complex situations.

▶ OUR APPROACH

We find simple and elegant solutions amidst complex realities. We know how to step into your position to profoundly understand your challenges before stepping back to assimilate a broad perspective. Along the way, we become your trusted adviser as we work together to answer perplexing questions and break through the obstacles that stand in your way.

▶ OUR SPECIALTIES

We work with public officials to create and implement strategies and actions that improve the quality of life for communities, and we help business leaders and not-for-profit executives deal with tough issues. Simply stated, we stimulate investment.



- Industry and workforce analytics
- Entrepreneurship and innovation
- Strategic and organizational planning
- Economic and fiscal impact analysis
- Real estate development services
- Lead generation and business relationships

Economic development is a process that requires a comprehensive understanding and unique approach for advancing economic prosperity—that's what we do.



Alexandra Tranmer, CEcD | *Director of Industry and Workforce*

Alex uses her background in economic geography and urban planning to inform how she approaches the challenges facing communities. Alex delves into a community's historic economic activity and learns about assets and challenges to help formulate sustainable strategies that will encourage job creation and small business development. She believes that building grassroots momentum for economic development activities helps to create long-term community support and draw in partners to help implement economic goals.

Alex has led complex strategic planning efforts in geographies that range from bustling urban centers to pastoral tourist destinations, requiring adept stakeholder management and collaboration. She works with clients to balance the competing interests of stakeholders, while ultimately helping the client develop a plan that is ambitious, yet achievable under their current organizational climate.

FEATURED PROJECTS

Advanced Manufacturing Industry Analysis | State of New Hampshire |

Alex led a team to study New Hampshire's diverse manufacturing base and determine emerging opportunities for the state's prominent subsectors. Alex coordinated engagement efforts with private sector and educational institutions during data collection and strategy development.

Entrepreneurial Ecosystem and Economic Development in Cattaraugus County | Olean Business Development Corporation | New York |

Alex led a team to create a shared vision and action plan for a rural county in southern New York. Motivated by recent wins in business attraction and entrepreneurial activity, an economic development work group enlisted Camoin Associates to help them develop a vision that fit the assets of the county and set aspirational goals for the future. The plan was well received by partners and has led to renewed direction from the group, which has used the plan to acquire funding to implement initiatives related to the plan.

Empire State Development | Central New York Regional Economic Development Council (REDC) Strategic Plan |

With a series of transformational investments on the region's doorstep, Alex and her team facilitated a strategic planning process that helped the REDC evaluate its ability to harness this economic potential. Through data analysis, business engagement, and meetings with community leaders, Camoin Associates developed an ambitious strategic plan that will help each part of the region access economic opportunities to match their assets.

JOINED CAMOIN: 2015

YEARS OF EXPERIENCE: 9+

EXPERTISE

- Project management
- Stakeholder coordination and consensus building
- Real estate and economic data analysis
- Emerging downtown and retail trends
- Marketing and branding

AFFILIATIONS

- International Economic Development Council Candidate

EDUCATION

- Master of Science in Planning, University of Toronto
- H.B.A. Political Science, University of Toronto



Christa O. Franzi, CEcD | *Vice President + Director of Entrepreneurship*

Christa brings over 15 years of experience helping public sector clients across the US deploy successful strategies and programs that support entrepreneurship, launch new businesses, and build strong ecosystems, resulting in dynamic, diverse, and equitable economies. Her unique talent for creative problem-solving helps communities make sense of complex systems and capitalize on otherwise hidden opportunities. As an ambassador for [Right to Start](#), she is a catalyst for positive change, breaking down barriers and expanding entrepreneurial opportunities for all. Christa is passionate about creating opportunities for business owners from all backgrounds to thrive.

JOINED CAMOIN: 2010

YEARS OF EXPERIENCE: 15+

EXPERTISE

- Entrepreneurship-led economic development
- Entrepreneurial ecosystem feasibility
- Business incubator/accelerator feasibility
- Main street business strategy

AFFILIATIONS

- InBIA Member, Conference Speaker (2024)
- IEDC Entrepreneurship-Led Economic Development Committee (2024)
- Right to Start Ambassador (2024-present)
- InBIA (2024-present)
- NYS Basic Course Director (2023-present)
- NY Business Plan Competition Judge (2021-present)
- NEDA Board (2016-2017), Communications Chair, Member of the Year (2016)
- CEcD Certification (2016)

EDUCATION

- MS Binghamton University
- BA SUNY Oneonta

"She's the type of person that steps up to the plate, sees a challenge, and knows how to make a solution."

- Anthony Capece, STEAM Garden

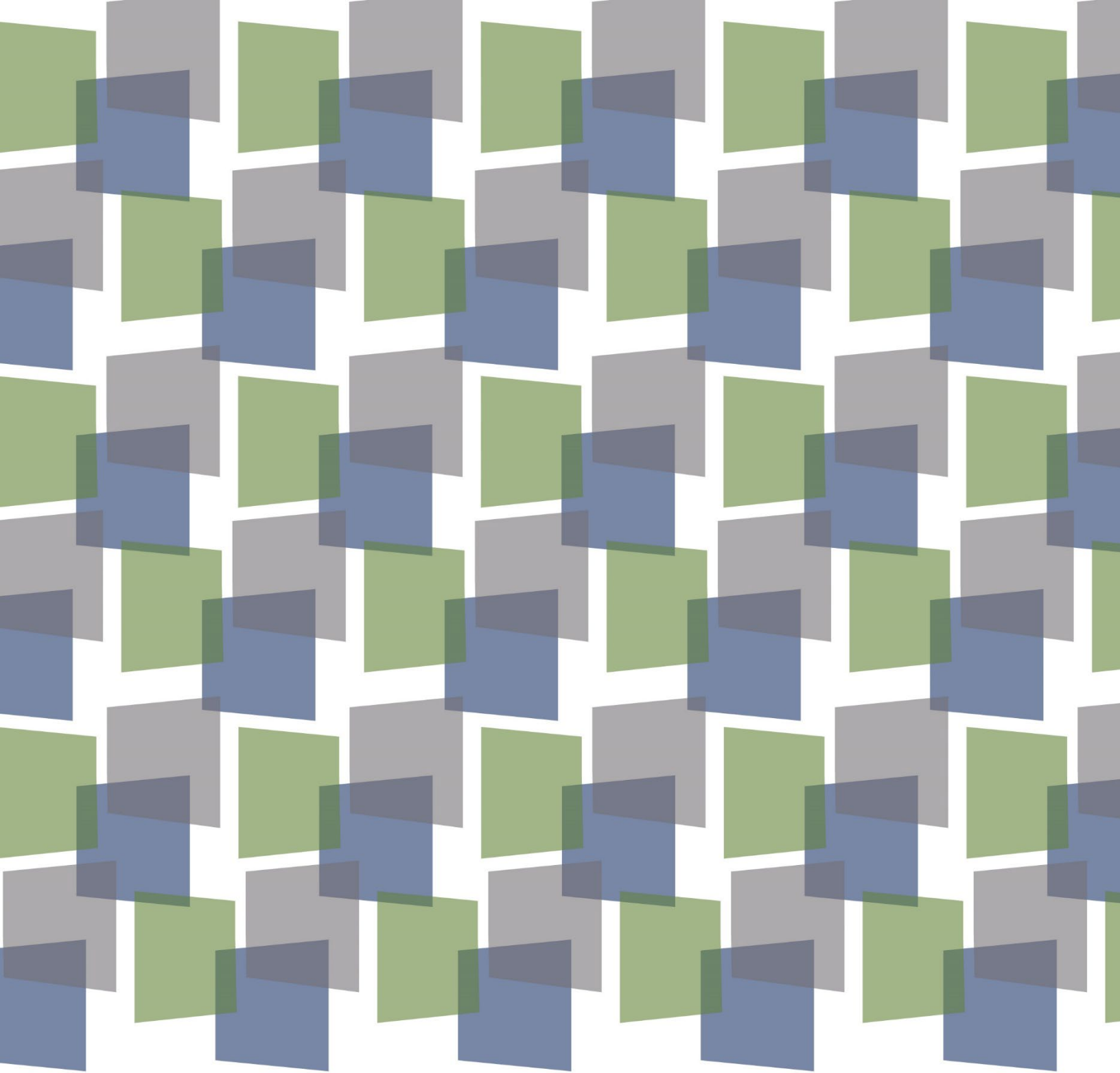
FEATURED PROJECTS

Targeted Industry Business Attraction Blueprint and Marketing Strategy | Montgomery IDA | New York | Once the Camoin Associates team helped the County refine its targeted industries, Christa developed a Targeted Industry Marketing Strategy, which provides deliberate steps to promote and present information about Montgomery County's assets, amenities, and opportunities to attract business investment within the targeted sectors of Advanced Manufacturing, Food Manufacturing, and Transportation, Warehousing, and Logistics. The County is implementing Christa's recommendations, beginning with overhauling their website: montgomerycountyworks.com.

Emerging Opportunities in Entrepreneurship | Loudoun County, VA | Christa led an entrepreneurial ecosystem gap analysis and strategy development to help the County firmly establish and right-size its role in the entrepreneurial ecosystem. While the county is a tech hotbed, Christa helped the county expand its business support programming to include retail and culinary main street businesses that give the region its rich character, culture, and quality of place.

Albany County Economic Development Strategy | Albany County, NY | In late 2019, Christa completed a bold economic development strategy and organizational plan for Albany County, which is the only county in the Capital Region without an economic development organization. Following the adoption of the strategy, the County retained Camoin Associates for Christa's expertise to help establish a new county economic development entity, Advance Albany County Alliance.

Entrepreneurship-led Strategy | Olean Business Development Corporation | Christa led the initiative to evaluate the county's budding entrepreneurial ecosystem and its impact on broader economic growth. She crafted entrepreneurship-led strategies to enhance connections between key assets such as the St. Bonaventure University Innovation Center and the Laine Business Accelerator. Under Christa's leadership, Cattaraugus County has positioned itself to reach ambitious objectives, and, in the process, has created more opportunities for greater economic equity and prosperity.



www.camoinassociates.com