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TALK OF THE

TOWNS

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MAY/JUNE 2026



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Talk of the Towns & Topics is a publication of the Association of Towns of the State of New York, 150 State Street, Albany, NY 12207, (518) 465-7933. The opinions expressed by the individual authors in the publication do not necessarily reflect the opinions or official positions of the Association of Towns. Acceptance of editorial and/or advertising content in this publication does not imply an endorsement of products or services by the Association.

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Microcredentials? Major Impact.

By Executive Director Christopher A. Koetzle



As we head into the summer, my mind turned to the work that fills those nicer, longer days. We have worked on the topic of workforce development heavily. Did you know that you have microcredential and other professional development opportunities available to you as a NYAOT member?

"Chris, what's a microcredential?" you may ask. A microcredential is a short, flexible educational program of a specific, in-demand skillset, for example grantwriting or GIS. As part of our effort to address the ongoing work preparedness issue that local governments are facing, we've partnered with accredited institutions like SUNY-Potsdam and SUNY-Westchester Community College to bring affordable and flexible professional development to our members and younger New Yorkers just entering the workforce. Best of all, some of these credits count toward your CTO Program. Please visit our website and click on "[Events and Education > SUNY Partnerships & Professional Development](#)" to see the many different programs available to you, your staff and any student in the state.

Building off of that, our 2nd annual golf tournament coming up on September 21 for our foundation – [New York Municipal Empowerment Foundation \(NYMEF\)](#). NYAOT established this foundation to raise resources for scholarships and other training and education to support our workforce development initiatives (like microcredential training and other professional development courses of study). Please consider golfing, donating, or supporting this important effort. Every swing supports a great cause! Earlier this year, we were able to provide scholarships to students from the Confident Girl Mentoring Program, enabling them to attend our annual conference and see first-hand some of what working in public service and local government entails.

New this September is going to be our very first legislative conference. We will be holding this conference in Albany on September 22 and 23 (conveniently following the golf tournament). We recently moved some association business out of being conducted in New York City, which will allow more towns with smaller or stricter budgets, or those who prefer not to travel to New York City, to participate in some great training on issues affecting our members, adopting our agenda and conducting other business that drives the direction of the Association! In order to attend and cast a vote, member towns will need to pass town board resolutions appointing their voting delegate and an alternate. Additionally, if you have any items that you would like considered for inclusion on that agenda, please get your town board-passed resolution into the Association by the end of June to be considered. We will be mailing information regarding this conference next month.

Each year, we work hard carrying our members' message to the elected officials at the state Capitol. I am calling on our members to become more active in our efforts and help us deliver the message to your state representatives. We'll be calling on you to send letters, make phone calls, and/or host a meeting. Your involvement and your voice can make a big difference. In fact, we've got a recap of our recent successful Lobby Day on the pages following and Deputy Director Sarah Brancatella and I just returned from a productive trip to Washington D.C. as part of our work with the National Association of Towns & Townships (NATaT), a great organization that advocates on behalf of local government at the federal level.

I am also pleased to report that our podcast is growing. All your "likes," "shares," and "subscribes" are working. If you haven't checked it out yet, please do. You can find it on YouTube and Spotify. If you have an idea for a topic or would like to appear as a guest, please reach out at ckoetzle@nytowns.org and we would love to work it into the schedule.

Enjoy the start of the summer season and as always, be safe.

Lobby Day Puts Town Priorities Front & Center

ALBANY — A contingent of town officials, led by New York Association of Towns (NYAOT) Executive Director Chris Koetzle and staff attorneys, traversed the halls of the state Legislative Office building, as part of the organization's annual Lobby Day on May 5.

The delegation thanked state lawmakers for sponsoring or co-sponsoring bills on issues the organizations and town officials consider important while at the same time enlisting support from them for newer initiatives on the organization's [legislative priorities](#).

This year, the group visited separately with Sens. Michelle Hinchey, Monica Martinez, Jeremy Cooney, and Pat Fahy, and Assembly members Mary Jane Shimsky, Paula Elaine Kay, Michaelle Solages, Dana Levenberg, and Michael Cashman, among others, to discuss items on its legislative agenda.

NYAOT Deputy Director Sarah Brancatella, Chief Counsel Lori Mithen-DeMasi and Association Counsel Katie Hodgson also briefed the legislators.

The Association is pushing for retirees, who collect a state pension, to be able to earn \$50,000 a year. Right now, that figure is capped at \$35,000.

"We have a real workforce shortage issue among the towns, finding qualified people to do things like receiver, clerk, or assessor, is very hard, and some people want to retire, but they still want to contribute and come back to work, and so we would like to see that raised," Koetzle said.

Those individuals would then ostensibly remain around to train their younger counterparts.

Koetzle thanked Shimsky for sponsoring the '[Local Government Modernization and Transparency Act](#)' measure that would allow municipalities to post legal notices on their official web site instead of publishing them in newspapers.

NYAOT leaders also talked affordability and town finances.

"We think that it's fundamentally unfair that a county IDA gets to say to a town, 'Guess what, we're taking your levy for this project' ... the issue is that towns really only have their levy," Koetzle said. "Where towns are in a particularly bad situation is that 90 percent of the time, we're the ones that have the infrastructure costs – it's our roads, it's our sewer, it's our water, it's our public



safety, and we're not getting levy and we're not getting any benefits of the project."

Two other key issues are the Sewer Water Action Plan (SWAP) and Other Post-Employment Benefits (OPEB).

"When I talk to members across the state about all of our issues, I've had them stop me and say, 'SWAP is what you gotta get done,' more than anything else," Koetzle said, lauding Hinchey for being a "huge supporter." She has introduced [legislation](#) to address the matter.

The measure, however, has stalled in the Assembly.

OPEB, explained Koetzle, is an "unfunded liability that could be as high as \$27 million for an average-size town.

That huge number negatively affects a town's bond rating, drives up costs, and creates a "ticking time bomb" because of skyrocketing healthcare costs.

The problem is compounded, Koetzle said, because the state does not allow towns to set aside a reserve fund to offset OPEB.

"I think it's an oversight because this is a relatively new issue for towns, but we need a reserve fund to allow for towns to put aside OPEB reserves so they can start funding these liabilities in the future," Koetzle said.

Koetzle, who previously served as the supervisor in Glenville (Schenectady County) for 15 years, recalled early in his career when municipal government jobs were highly coveted.

"Today, it seems like nobody even knows what a town is," Koetzle said.

The loss of institutional knowledge when seasoned employees retire is also a workforce issue in towns.

Brancatella is optimistic that a bill proposed by Assemblywoman Michaelle Solages to extend piggybacking for another three years, once it expires on June 30, will pass muster.

Piggybacking allows towns, municipalities, and school districts to save time and money by other governments by circumventing the need to conduct their own bidding process.

In New York, local governments, school districts, and municipalities are required to use competitive bidding for purchase contracts over \$20,000. It's been that way since 2010 and because of the higher cost of goods, NYAOT believes that figure should be higher.

"There's a public notice element with that, it takes time, it takes money, and increasing those to reflect inflation and the increase of costs and goods would be helpful in terms of efficiency. We think 16 years is a long enough, and it's time for an update," Brancatella said. □



The Frayed Frontline

Burnout in Local Government and What We Can Do About It

Author's Note: *This article describes the author's broader research effort examining the pressures facing local public service organizations across New York State and the practical strategies that may help them become more resilient, effective, and sustainable. My research focuses on the intersection of employee stress and burnout, public-facing incivility, workforce strain, resource limitations, and communications challenges, especially in smaller, low-resource communities where these pressures can be especially difficult to absorb.*

The central question guiding this research is whether a more cost-accessible, customized support model can strengthen both employee well-being and organizational performance by combining internal staff support, practical mental health training and education, and stronger systems for public communication and community relationship management.

The next phase depends on hearing directly from the people doing this work every day. I am seeking input from managers, supervisors, front-line staff, and others working in or alongside local public service organizations across New York State. Their perspectives are essential to understanding where stressors are most acute, what supports are missing, which solutions feel realistic in practice, and how a pilot model could be designed to better reflect the realities local organizations face.

If you are a local government employee, manager, or elected official in NYS, I invite you to participate in the survey or indicate your interest in taking part in a research interview. The survey can be accessed through the link or

QR code provided later in the article. If you are willing to share additional perspective through an interview, there is space to express that interest as well. Your participation will help shape research intended to identify practical, people-centered, and deployable ways to support the organizations that keep our communities functioning.

May is **Mental Health Awareness Month**, a time to reflect on the importance of mental health, reduce stigma, and work together to find new ways to support those facing mental health and wellness challenges. Sadly, we are seeing a growing mental health crisis confronting local government employees and local elected officials across NYS. This is a crisis that we cannot afford to ignore considering how much we all depend on the services provided by local government.

It isn't hard to see how stress, anxiety, and burnout have an outsized impact on local government employees. Most people interact with local government frequently and directly. Local government is visible and often is the first place where people must fulfill legal obligations, adhere to regulations, or pay fines, fees, and taxes. During emergencies, the first response is almost always from local agencies. When people are confused, stressed, angry, or scared, those emotions are first directed close to home. This reality makes towns, villages, counties, and other local jurisdictions both the most human face of government and the most exposed.

Unfortunately, thanks to online forums, social media, and recent cultural divisions, the vitriol faced by local public servants is becoming harder to manage. The

resulting impacts are dramatic and consequential for both local employees and local government institutions. For instance, according to a survey conducted by the National League of Cities, local officials reported widespread harassment experiences. Interestingly, while more than 8 in 10 surveyed local officials have experienced some form of harassment, threats, and violence, fewer than half work in an office with a strategy to handle these incidents. All this pressure is leading to emotional exhaustion, disengagement, absenteeism, turnover, and declining service quality.

When looking at the sector, the picture becomes starker. The local government workforce outside of the NYC metro region is in decline. Local governments employed 452,298 full-time workers in 2022, roughly 39,000 fewer than in 2007. At the same time, many local public

departments and agencies are dealing with higher service expectations, accelerating retirements, funding strain, and a growing trend towards public incivility or outright threats of violence. Financially, there has been a \$15.8B decline in NYS federal funding distributions in FY2025 vs. FY2024. This includes many grants and sources of assistance local jurisdictions depend on for critical services, especially in lower-resourced areas like rural regions across upstate NY.

This is not just an employee wellness issue. It is an organizational effectiveness issue.

If local government becomes an unwelcoming, stressful place to work, recruitment and retention become more difficult, leading to fewer experienced staff on hand to do the job. When morale is low and anxiety is high,

Continue the Conversation!

For more discussion on this topic, check out our May 20 episode of the NYAOT Podcast [Talk of the Towns](#), where Adam Howell, Outreach Director for NYFarmNet, Cornell University appears as a guest to discuss his research and survey. Survey Link: https://cornell.ca1.qualtrics.com/jfe/form/SV_bK1rQHnmyne640S or scan the QR code to the right. Interested in an Interview? Contact Adam Howell at ah959@cornell.edu



the public is the first to notice. Stretched, unsupported, and overburdened managers do not have the resources to address problems or properly assist their staff. When recruitment and retention are impacted, the costs for all taxpayers are high. One study in 2015 calculated the cost of turnover for full-time public sector employees to be 100–150% of their annual salary. According to the World Health Organization, around 15% of working-age adults worldwide are estimated to have a mental disorder at any point in time. Depression and anxiety are associated with roughly 12 billion lost working days per year, costing the global economy about \$1 trillion annually in lost productivity. The WHO recommends organizational interventions, manager training, and worker training to prevent work-related mental health conditions and support employees with existing conditions.

The Stress Ecosystem Local Government Employees Face

It is important to remember that local government employees usually live in or close to the locations where they work. In smaller communities, the line between professional and personal life can be especially thin. The person being berated at the counter may also be a neighbor. The official criticized online may also be the person at the grocery store, school event, or post office line. In small communities, there is often less anonymity and more pressure to simply “tough it out.” Some employees face the public every day and have little training or resources to help them manage the stress of these roles.

On the organizational side, local governments are expected to do more with less. Many are contending with reduced workforce capacity, impending retirements, difficulty recruiting qualified staff, and overwhelming administrative burdens. Some communities also lack the resources or experience to implement effective community relations and communications systems. If information is hard to find, unclear, delayed, or inconsistent, public frustration rises. The resulting frustration is then directed at the nearest employee, even when the underlying causes are out of their control.

If burnout is treated only as a private matter for employees to manage on their own, disaster may result. Local governments cannot simply brush off chronic



understaffing, rising hostility, poor communication, or weak internal employee support. It is also not feasible to wait and hope for better budgets, more staff, or a sudden increase in outside clinical mental health support. In many parts of New York, especially outside large urban centers, mental health support is scarce. Ten rural counties in New York State contain designated Medically Underserved Areas or Populations, and all rural counties have areas designated by the U.S. Health Resources and Services Administration as Health Professional Shortage Area populations or geographies. In fact, the Office of the State Comptroller rural health shortages report finds “alarming” gaps across multiple professions, including mental health practitioners, across 16 rural counties.

Internal Organizational Supports and Systems

First, local governments need more internal training and education around stress, burnout, mental health literacy,



stigma reduction, de-escalation, and peer support. This does not mean turning clerks, assessors, laborers, or department heads into therapists. It means giving staff and supervisors new skills to manage strain, recognize colleagues showing signs of stress and burnout, respond appropriately, and know how to connect them with help. Evidence-based models such as Mental Health First Aid, QPR, Talk Saves Lives, and other community-based approaches can improve knowledge, confidence, and increase peer helping behaviors. Many of these programs can be adapted to unique jobs or local communities to make them more relevant to trainees.

A second critical element includes workplace culture. Research points to workplace inclusion, peer support, and belonging as meaningful defenses against emotional exhaustion. One study found that higher perceived inclusion is associated with lower emotional exhaustion among local government employees. Another showed that relatively simple, peer-based interventions reduced burnout and resignations among frontline public workers by increasing social support and belonging. These studies show that not every effective strategy requires expensive new programs or services.

Third, local governments should take a fresh look at their current support systems like Employee Assistance Program (EAPs) and mental health referral services. In some organizations, the issue is not the total absence of support, but lack of awareness, lack of trust, or difficulty accessing what exists. If employees do not know what is available, do not believe support is confidential, or fear of judgement, these programs and resources may as well not exist. Enhancing EAP communications, normalizing use, and pairing formal support programs with supervisor and peer-level interventions can build resilience and internal fortitude.

External Public Engagement Systems as an Integrated Approach

Local governments also need public-facing strategies that reduce the intensity resulting from working with citizens. That means more training for public-facing employees

in de-escalation, how to have difficult conversations, and crisis-informed communication. It means equipping staff to handle emotionally charged interactions while learning how to better manage the stress related to these experiences. These communication strategies should be structured to provide clearer public information, better feedback mechanisms, stronger documentation processes, and consistent procedures when incidents occur.

Just as important, local governments need to invest more seriously in community relations and communications capacity because communication failures increase pressure on staff. When residents do not understand timelines, requirements, jurisdiction, or constraints, frustration rises. When there are no good constituent management systems or feedback channels, preventable conflict becomes routine.

A 360-Approach to Local Government Resilience

The most promising model is not one single training class or new policy. It is an integrated approach that assesses unique organizational needs, selects the most appropriate internal staff training programs, enhances or builds new systems, and improves communication and engagement with the public. The greatest benefit of an integrated approach may come from the positive reinforcement that each of these changes can have on one another. Better-supported employees are more capable and engaged. More supportive organizations can adapt and retain talent. Clearer communication and positive public interactions build trust and reduce conflict while giving citizens more confidence in local government.

The answer is not to lower expectations or simply accept that local government jobs must be difficult and thankless. We must recognize that public service depends on human infrastructure. These men and women are the connective tissue of local life. When they are supported, trained, informed, and given the tools they need to succeed, local agencies become more stable, effective, and respected.

While the challenges facing local government are daunting, there is plenty of opportunity for success. Above all, we need to start treating employee mental health as a central issue and a condition of sound governance.

Today, the frontline of local government feels increasingly frayed but that doesn’t mean we have to accept burnout and failure in local government as an inescapable destiny. We can provide employees with support, we can improve

services for our communities, and we can rebuild trust. It may take a little creativity, strategy, and humanity, but at the end of the day, we can create real solutions and positive change to the benefit of all. □

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Expanding the Definition of Safety: Maintaining a Positive Work Environment

By Bob Blaisdell, Director of Risk Management, Comp Alliance

Studies have shown that a safe, cooperative atmosphere can lead to better morale, improved efficiency, lower costs, less time lost, and greater recruitment and retention. In fact, the best work environments foster focus, collaboration and incorporate well-being into safety programs.

Supervisors have a significant impact on workplace behaviors and cultures. Demonstrating and communicating a commitment to safety invites employees to take responsibility without fear of retaliation. There are many ways leadership can have a lasting effect on your town's work environment:

- 1. Open Communication.** Regular check-ins, team safety meetings, and honest feedback prevent confusion and reduce stress. Encourage two-way communication so employees feel heard, not just managed. Maintain an open-door policy.
- 2. Flexible Schedules.** Plan tasks so staff is aware of their responsibilities and can plan accordingly. Employees are more apt to take responsibility for task completion when they feel respected and included. However, not all tasks can be planned, like a surprise water main break. Offering flexibility allows staff to pivot when necessary.
- 3. Recognize Work and Positive Results.** Acknowledging effort and achievements – big and small – boosts morale. This can be as simple as a thank you, public recognition, or more formal rewards. Consider announcements during town



board meetings.

- 4. Employee Growth and Development.** Training programs are an investment that benefits employees and the workplace. Examine how your staff can proactively improve their skills through meetings with other municipal staff (i.e., NYAOT conferences, highway association, etc.) or regional safety training programs.
- 5. Maintain and Encourage Work-Life Balance.** Poor well-being decreases safety, potentially leading to injury. Communicate with staff the importance of taking time away from work. Encourage balance to reduce burnout.

Employee buy-in is the most important aspect of a successful health and safety program. Promote involvement by:

- Setting healthy boundaries (i.e., taking lunch breaks).
- Finding personal meaning in work.

- Customizing your workspace.
- Allowing some personal ownership.
- Breaking the routine when possible (change schedules).
- Scheduling annual events (employee appreciation lunch).
- Rewarding positive behaviors.

Creating an enjoyable workplace doesn't require an extraordinarily creative mind, a detailed approach, or extreme costs. Managers can build a supportive culture at work with high morale, trust, and employee achievement by combining supportive leadership, clear communication of goals, and the proper allocation of resources to enhance personal and professional growth. A manager's mood is contagious, and staying calm, optimistic, and solution-focused, even in the face of challenges, helps the whole team stay grounded. Successful safety programs are tailored to an organization's needs. Consider what additional unique ideas your town may benefit from. □

NYAOT News

NYAOT Announces New Staff Appointments

ALBANY --The New York Association of Towns (NYAOT) is pleased to announce the recent addition of three new employees to the staff. The positions will augment and expand the association's advocacy and member services, New York Association of Towns Executive Director Chris Koetzle said.

Paul Nelson, a veteran journalist, has taken on the role as the organization's media relations and public affairs manager.

With 20 years of experience as a news reporter with the Times Union in Albany and having covered several Schenectady County towns, Nelson brings with him a familiarity of the more pressing issues facing towns, including Home Rule, aging infrastructure, the real property tax cap, and other fiscal pressures and state mandates that impact towns.

"My journalism background has helped to inform and educate me about the many challenges towns are grappling with," he said.

Nelson hopes to highlight some of those matters by talking with

elected officials about possible solutions and how NYAOT can be of assistance.

"I am especially excited about getting to know as many of the residents and leaders in the towns across the Empire State and the issues in their hometown that mean the most and are of the greatest concern to them," Nelson said. "I am also looking forward to unearthing and bringing to life to some of their unique and compelling stories, whether it's hard news, or a neat profile about their next-door neighbor or local bookkeeper."

When he's not relaxing with his family, Nelson, a graduate of Rutgers University in New Jersey, enjoys working out and watching sports.

Megan Betke, a SUNY New Paltz graduate with a master's degree in library & information science, whose résumé features positions in research, information literacy, and time working for two New York congressmen, will serve as the organization's legislative analyst

and research specialist.

"I am looking forward to finding ways to make dense or complex legislative information more digestible and easier to navigate for our members," she said about one of her goals for her new jobs. "I also just wanted a position in which I could use my skills from both my work in Congress and through my schooling in regard to research and advocacy."

Betke was formerly employed as a visiting librarian at her alma mater before joining NYAOT, and has also worked for Congressman Patrick Ryan and Antonio Delgado, who later was appointed by Gov. Kathy Hochul as New York's lieutenant governor.

As an added bonus, Betke comes from a family that has been active in Coxsackie politics for generations.

She recounted hearing a lot about the importance of local government while growing up.

Her father served two terms as the supervisor of the town of Coxsackie in Greene County. Her late great-grandfather was mayor of the



"Each of them brings a new energy experience and unique talents to the association. I'm looking forward to our work together and to their contribution toward helping us serve our mission of supporting New York towns."

NYAOT Executive Director Chris Koetzle on the association's new staff additions

village of Coxsackie.

Betke enjoys spending time with her family and friends, loves fiber arts and the history of craft making, and has been teaching herself to filet crochet so she can one day make lace doilies. Fiber arts are fine art forms created using natural or synthetic fibers such as yarn, thread, or fabric.

Holly Macera, another product of the Hudson Valley region, credits her high school teacher Michael Stott, who in her senior year ran and won a seat on the Coeymans Town Board, for piquing her interest and giving her greater awareness of local government and politics.

Coeymans is in Albany County.

Stott is listed as the deputy supervisor on the town's web site.

"I thought that was really interesting, and hearing all about the different things that he had to go through to be able to run," she said.

Macera, who has an associate's degree in political science from Hudson Valley Community College in Troy, has assumed the role as the member outreach specialist where she'll connect with members via the database and at NYAOT functions. Additionally, she'll serve as Koetzle's administrative assistant.

When she's not busy with work,

Macera likes to unwind by sewing, baking, reading, and hiking. One of her favorite destinations in New York is the Oneida Community Mansion House, a historic landmark in the city of Oneida.

Her family, she said, has been involved in the preservation of that site for a long time.

Macera's first day on the job was April 13. Nelson and Betke started on May 4. □

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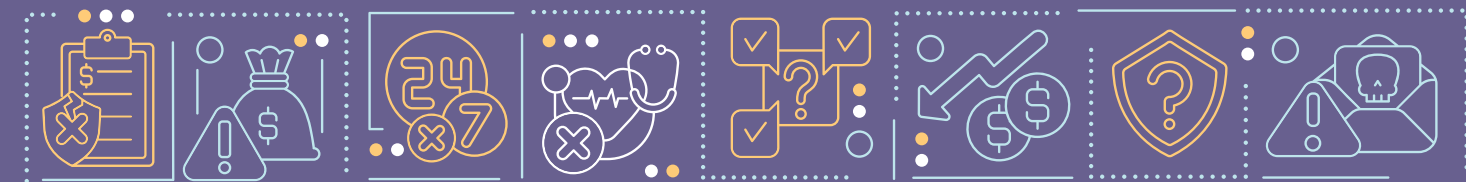
Paul Nelson



Megan Betke



Holly Macera



How Municipalities Can Create a Health Care Consortium under Insurance Law Article 47

By Sarah Brancatella, Deputy Director/
Legislative Director, New York Association
of Towns

Overview and Purpose

New York’s Insurance Law Article 47 allows two or more municipalities to band together and create their own self-funded health insurance plan for their employees, retirees, and dependents – essentially forming a cooperative that acts like an insurance company for its members. The Legislature created Insurance Law Article 47 to give public employers an alternative to buying commercial insurance, with the goals of stabilizing health claim costs, lowering administrative costs, and giving municipalities more negotiating power with healthcare providers by pooling risk across a larger group.

The trade-off is that because the plan is self-funded rather than purchased from a licensed insurance company, participating municipalities take on real financial risk. Article 47 therefore imposes a detailed set of safeguards, such as minimum size requirements, reserve requirements, stop-loss insurance, ongoing reporting, and state oversight by the Superintendent of the Department of Financial Services (DFS), to make sure plans remain solvent and can actually pay the claims they promise.

Eligibility & Participation

Only “municipal corporations” can join. Under § 4702, this includes cities with a population under one million, counties outside New York City, towns, villages, school districts, BOCES, public libraries, and special districts.

Step 1: Negotiate and Adopt a Municipal Cooperation Agreement

The foundation of the consortium is a written “municipal cooperation agreement” entered into under Article 5-G of the General Municipal Law. Every participating municipality must approve this agreement by a majority vote of its governing body (for a town, that’s the town board).

Under § 4705, the agreement must:

- Identify which municipalities are participating and describe what types of municipalities are eligible to join later.
- State plainly that all participants agree to share costs and assume liabilities for the medical, surgical, and hospital benefits provided to their employees, retirees, and dependents.
- Commit each participating municipality to pay its share of any assessment the governing board or the Superintendent later orders.
- Spell out eligibility rules, including any reasonable geographic boundaries, but it cannot shut out an eligible municipality of the same type within the geographic region that can prove financial responsibility, and it cannot restrict which eligible employees or retirees can enroll.
- designate one participating municipality’s fiscal officer as the consortium’s chief fiscal officer,
- designate an attorney-in-fact to receive legal process
- Establish a governing board to run the consortium
 - Unions that are the exclusive collective bargaining representatives of covered employees must be given representation on the governing board, and those unions get to decide how their board representatives are selected.
- Lay out how the chief fiscal officer handles money including custody rules, payment procedures acceptable to the Superintendent, authorized investment types, and the rule that the fiscal officer receives no compensation beyond reasonable expense reimbursement to their employing municipality.
- Address withdrawal (what happens to a

municipality’s share of reserves and liabilities if it leaves) and must include language protecting the confidentiality of covered persons’ medical records.

Step 2: Build the Operational Infrastructure

Before applying for state approval, the governing board has to design the actual plan. Under § 4705(d), the board is responsible for designing the benefit package, preparing the plan document and summary plan description, establishing a joint fund to finance all plan expenditures, and preparing an annual budget that determines what each participating municipality will contribute.

The board has to use a “community rating” methodology for setting contribution rates, meaning the premium equivalent rate is the same for all covered persons based on the experience of the whole pool, without regard to age, sex, health status, or occupation (§ 4702(a)). The board can hire an actuary to estimate expected expenses, and it can contract with a third-party administrator to handle claims, so long as the contracts are in writing, payment is only made after services are rendered, and no board member (or immediate family) has a financial interest in the administrator.

Step 3: Obtain Stop-Loss Insurance

Under § 4707, the consortium must purchase stop-loss insurance, essentially reinsurance that kicks in when claims get unexpectedly large. Two layers are required:

- aggregate stop-loss coverage that attaches at no more than 125 percent of expected annual claims (protecting against a bad year overall), and
- specific stop-loss coverage that attaches at no more than 4 percent of expected annual claims (protecting against one catastrophically expensive individual claim).

The Superintendent can waive or modify these requirements if the consortium holds reserves and surplus at 150 percent of the minimums, or otherwise demonstrates solvency and stability.

Step 4: Meet Reserve and Surplus Requirements

Under § 4706, the consortium must establish and maintain multiple reserves funded by its chief fiscal officer:

- A claims reserve of at least 25 percent of

expected incurred claims and expenses for the current plan year (a qualified actuary can justify a lower amount to the Superintendent’s satisfaction).

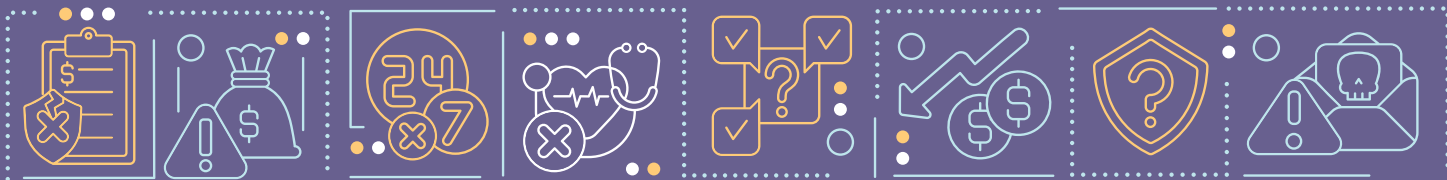
- A reserve for unearned premium equivalents.
- A claim stabilization reserve.
- A reserve for other obligations.
- A surplus account to cover unexpected obligations in the event the plan terminates, equal to at least 5% of annualized earned premium equivalents for larger consortia (five or more municipalities and 2,000+ covered employees/retirees) or 7% for smaller ones.

All of this money must be held in segregated accounts at New York-chartered banks or trust companies, invested only in instruments authorized by the General Municipal Law or Education Law for reserve funds, and accounted for separately from all other plan funds with detailed recordkeeping.

Step 5: Apply for a Certificate of Authority

With all of that in place, the governing board applies to the Superintendent of DFS for a Certificate of Authority under § 4703. The application is extensive and must include:

- the full list of participating municipalities
- board members,
- the attorney-in-fact
- proof that the chief fiscal officer is adequately bonded
- the cooperation agreement and all related documents; the plan document and summary plan description
- all service-provider contracts
- a qualified actuary’s opinion (with a supporting memorandum) confirming the plan is actuarially sound and that contribution rates will be sufficient to meet reserve requirements
- a certified statement and proof that stop-loss coverage will be in place
- and a detailed plan of operation and funding covering premium equivalent rates, itemized costs, expected enrollment, claims handling



procedures, dispute resolution and appeals processes

- how service providers will be selected,
- Current and projected financial statements.

The Superintendent has broad investigative powers and can examine anyone connected to the plan under oath.

Step 6: Meet the Statutory Thresholds for Approval

Under § 4704, the Superintendent will only issue a Certificate of Authority if specific conditions are met. The consortium must have at least three participating municipalities and at least 2,000 covered employees and retirees (not counting dependents). There's a narrow grandfather exception for consortia that were already providing services on or before January 1, 1993 under an existing municipal cooperation agreement.

In addition, the plan must have adequate facilities and personnel (or qualified contracted administrators), hold the required stop-loss coverage, have premium equivalent rates sufficient to meet its obligations and reserves, have fair claims review and dispute resolution processes including arbitration and dissolution procedures, provide required bonding or security, give statutory written disclosures to covered employees and retirees, and file all plan documents with the Superintendent for approval.

If the Superintendent refuses to grant the certificate, the applicant has 30 days to request a hearing to contest the refusal. Once a consortium is operating, additional municipalities can join by signing an identical cooperation agreement.

Step 7: Provide Required Disclosures

Under § 4709, the summary plan description is treated like a health insurance subscriber certificate, and the plan document and summary plan description must each carry this conspicuous warning on the first page in at least 10-point bold type: the plan is not a licensed insurer, it operates under a limited certificate of authority, and participating municipalities are subject to contingent assessment liability. That last point is critical — employees and retirees need to understand the plan's legal nature, and municipalities need to understand they are on the hook for additional assessments if the plan runs short.

Ongoing Obligations After Approval

Becoming certified is just the beginning. The consortium has continuing duties:

- *Annual and quarterly reporting* (§ 4710). The governing board must file an annual report with the Superintendent within 120 days after the plan year ends, including an independent financial audit and an independent actuarial opinion, plus quarterly financial status reports. The annual report must also be distributed to participating municipalities and covered unions, and made available to covered employees and retirees.
- *Material change filings*. Any material change to the information in the original application must be filed with and approved by the Superintendent.
- *Examinations* (§ 4711). The Superintendent examines the consortium's affairs at least once every three years (extendable to five years if the Superintendent determines more frequent review isn't needed to protect the public).
- *Contingent liability* (§ 4708). If the plan ever lacks admitted assets equal to its liabilities, reserves, and minimum surplus, the governing board must issue an assessment order within 30 days, and every municipality that participated in the plan at any time during the prior two years must pay its pro rata share within 90 days. This contingent liability cannot be counted as an asset on the plan's financial statements.
- *Suspension or revocation risk* (§ 4712). The Superintendent can suspend or revoke the Certificate of Authority for the same reasons an initial application could be denied, for failure to maintain required reserves and surplus (unless a remediation plan is in place), or for refusal to cooperate with an examination. Importantly, the Superintendent cannot suspend or revoke a certificate solely based on plan size or composition unless coverage drops below 350 employees and retirees.
- *Dissolution* (§ 4713). If the governing board believes the plan may terminate, it must notify the Superintendent and submit a wind-down plan for approval, designed to ensure timely payment of all benefits. Plan funds cannot be claimed by general creditors of any participating municipality until all plan obligations are satisfied, and the Superintendent can place the plan into rehabilitation or liquidation under Article 74. □

TALK OF THE TOWNS



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Municipal Financial Planning: Some Basics for Townships in Times of Uncertainty

By Jeff Fasino, Institutional Sales & Relationship Manager, PFM Asset Management, a division of U.S. Bancorp Asset Management, Inc.

Local Government Investment Pools (LGIPs) play a critical role in managing public funds on behalf of towns, school districts, and other local government entities. While LGIPs like EPIC Fund NY place safety as one of their priorities when it comes to public funds, in a climate of economic uncertainty—currently characterized by concerns over escalating conflicts in the Middle East and their subsequent impacts on global fuel supplies—extra attention to the goal of safety becomes even more important.

Fluctuating tariffs and escalating trade tensions between major economies have kept inflationary pressures and market unpredictability at the forefront. As experienced during prior bouts of market volatility, these dynamics can ripple through state and local economies, impacting revenue streams and raising credit risk for public entities¹.

All of this can raise stress levels for local governments as they seek to manage their resources and continue to meet the needs of the citizens and businesses they serve: as the saying goes “when elephants fight, it’s the grass that suffers.”²

My colleagues and I at PFM Asset Management (PFMAM), program administrator to EPIC Fund NY, stress some fundamental principles to our municipal investors as a solid foundation for investment planning, regardless of economic conditions. In this month’s article, we will dive deeper into some of the key ideas we regularly share with our investors:

Maintain thorough Investment-Related Policies.

Above everything, local governments should create, or update, their policies that describe the specifics of their approach to investing.

¹ Brookings Institution & Public Financial Management (PFM). (2019). *Stress-testing local governments: Recovery and resilience in the face of recession*.

² Great Britain. Report by the Administrator of German East Africa (16 May 1918). Parliamentary Papers, House of Commons, 1918–1919, vol. 98, H.M. Stationery Office, 1919, pp. 24–25. [barrypopik.com]

Key elements should include: the policy’s scope; the delegation of authority and responsibility; a statement of approved investments and institutions; a statement of accounting and reporting requirements and other specific parameters of its investing. An investment policy provides a framework for decision making and provides a roadmap for officials, staff, and service providers to follow.

Ensure compliance. Local governments are required to place their assets within the specific investments spelled out in their individual codes. Some examples include:

- U.S. Treasury bills and bonds
- Obligations of agencies of the United States of America where the payment of principal and interest are guaranteed by the United States of America (full faith U.S. agency obligations)
- Appropriately FDIC-insured or collateralized deposits at financial institutions
 - Obligations of the State of New York
- Municipal Cooperation Agreements (LGIPs)

Keep detailed and current reporting on investments. A local government’s investment records should be clear and **regularly** updated to provide an accurate snapshot of the big picture at any time. Records should include: a listing of investments; cost, yield, accrued interest and maturity of investments; a comparison of current income with income projections; a listing of the market value of each investment and other measurements.

Seek to mitigate risk. While all investing involves some degree of risk, it is possible to diversify in such a way as to reduce and manage the risk -- match assets and liabilities and acquire investments with varying maturities and yields, securities with fixed and variable-rate interests and securities with an active secondary market.

Identify clear investment objectives. Know the expectations for each investment in terms of safety, accessibility of funds for expenditures (liquidity), degree of investment risk, and return on initial investment.

Engage in cash flow forecasting. Cash flow forecasting is the process of predicting cash flows for the purposes of liquidity management and financial control. With a clear picture of its cash flow, a municipality will be able to balance the timing of expenditures with the investment of additional funds for longer periods of time. And that means a municipality has the opportunity to take advantage of the higher interest rates typically associated with longer-term investments. Basing investment



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decisions on future cash flow needs also helps to base investment decisions on the needs of the local government. With a systematic approach you should not have to worry about the “right time” to make an investment based on market headlines but rather seek to obtain the best return based on your liquidity needs.

Compute breakeven analyses to help think through investing shorter or longer. A break-even analysis allows investors to better manage risk and diversification. An analysis evaluates and compares different maturity options for different investment products by factoring the rate of return and the duration of the investment. The relationship team at PFMAM who work with EPIC Fund NY might be able to help with that analysis.

Evaluate costs and yields. Free sometimes isn't really free. Costs can eat into a significant portion of a local government's returns, and yields can be quoted in many different ways. An evaluation that reveals a true comparison of expected results is important to making any investment decisions.

These key ideas represent a simple overview of some of the key elements of investing public funds. If you have questions, contact your EPIC Fund NY representative, or call the Fund at 1-866-534-4802. ☐

Jeff Fasino is an Institutional Sales & Relationship Manager with PFM Asset Management, the Investment

Administrator to EPIC Fund NY. He can be reached at Jeffrey.fasino@pfmam.com. Additionally, the NY OSC has a wonderful resource for investing and protecting public funds, found here: <https://www.osc.ny.gov/node/73946>

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Keeping Your Municipality's Roofs in Good Repair

By David Bloodgood, Vice President, NYMIR Risk Management



The importance of maintaining the roofs on your municipal structures may often take a back seat to day-to-day operations. The necessity of having a structured approach to roof maintenance cannot be understated.

Roofing design and materials are intended to withstand years of exposure to fluctuating weather conditions including hot and cold, wind, rain and the weight of snow. Without proper maintenance, defects and damage can go undetected, leading to a failure in protecting your buildings from the elements. This will result in further damage to interior spaces, structural components and/or the building's mechanical and electrical systems.

Damage to interior spaces resulting from roof leaks often include ceilings, walls, floors, mechanical and electrical systems. Office equipment and records can be damaged or destroyed. A ceiling collapse may cause injury. Hidden damage behind the walls can lead to mold and mildew. Such



issues can negatively impact the health of building occupants, especially those with asthma and other respiratory conditions. Leaks can also create slippery surfaces leading to injuries. If damage is severe, interior spaces may no longer be used until repair and remediation are completed. This displacement can lead to higher costs and lost productivity.

To initiate or improve upon roof maintenance practices, start with some basics.

- Identify the type of roof. These include Asphalt Shingle, Metal, Modified Bitumen, and others. One structure can also have different types of roofing

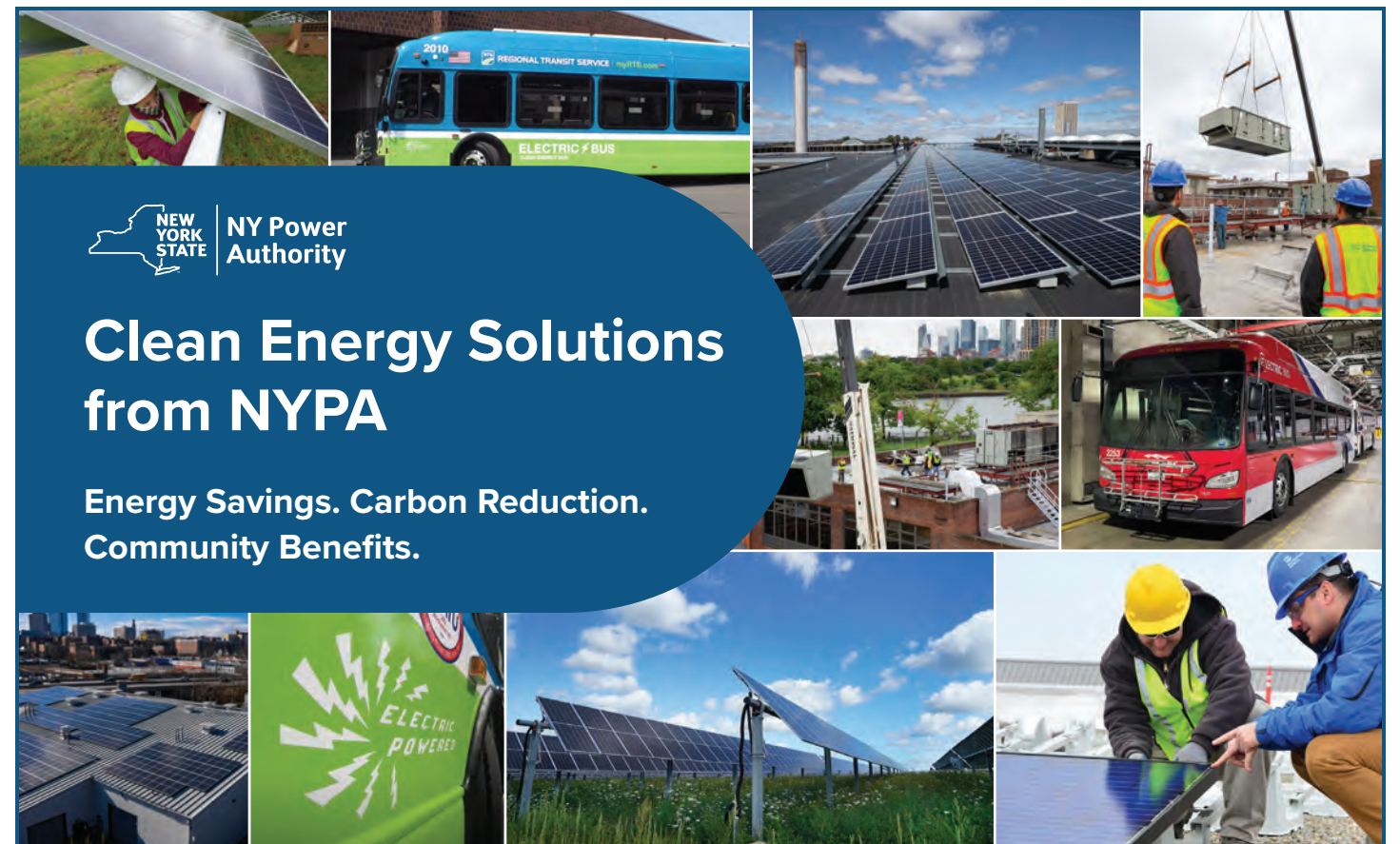
depending on the slope of the roof, additions, etc.

- Identify the age of your roofs and maintenance performed over time.
- Know whether a warranty is in effect. These typically require regular inspection, maintenance and repair of damage to remain in force.

A proactive approach to maintenance extends the life of a roof. Start with regular inspections. Schedule at least two inspections per year, one each in the Fall and Spring. This will ensure your roof remains in optimal condition as winter approaches, and that any damage is promptly identified and repaired after the freeze and thaw cycles.

Effective inspections include but are not limited to:

- Ensuring roof drains are clear and working properly.
- Eliminating vegetation.
- Debris removal.
- Examination of vents, skylights,



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chimneys and flashing for cracks or gaps.

- Taking note of standing water, stains or discoloration that may indicate ponding.
- Assuring gutters are clear, properly attached and sloped toward the downspout.
- Checking downspout inflow and ground level termination points for debris and clogging.
- Loose or missing shingles, or those that appear damaged.

Document your inspection. Take photos and use checklists. Call in a roofing professional at least every five years, or when your inspection reveals damage or defects which may require repair. It is wise to consider an expert in roofing with credentials such as Registered Roof Consultant (RRC) or Registered Roof Observers (RRO) who have no interest in performing the actual repairs. Utilizing an expert can eliminate the ethical concerns associated with evaluations conducted by entities that have a vested interest in upselling repairs. Then, acquire more than one estimate from qualified, insured vendors. Ensure your municipality enters into a contract specifying the scope of repair or replacement work to be performed. Require the vendor to add your municipality as an additional insured on their policy. Obtain warranty provisions in writing and keep these on file along with inspection records and invoices. These steps can be critical for securing warranty coverage or submitting a claim to your insurer.

NYMIR members have access to HelixIntel, a Computerized Maintenance Management System (CMMS), at no cost to them. The platform offers a comprehensive system for documenting facilities and asset management, issuing and tracking work orders, and creating records that can identify future needs such as budgeting for end of asset life based on

hard data. The information you collect during a roof inspection can be housed in a manner that will protect warranty rights while providing actionable information to guard against loss.

Other steps to take include:

- Protecting membrane roofs from wear and tear by minimizing unnecessary foot traffic on the roof and protecting those paths required for accessing rooftop systems, drains, etc.
- Maintaining rooftop systems such as HVAC units and checking that penetrations are properly sealed to prevent moisture damage. This will extend the lifespan of equipment and ensure efficient operation.
- Plan for seasonal maintenance. For example, adding insulation to attic spaces can prevent interior heat from melting snow on pitched shingle roofs and prevent the formation of ice dams backing up under and compromising shingles. Also, clearing snow from the perimeter of flat membrane roofs will facilitate thermal melt and allow the roof drains to remove melt water.

Once more, meticulously document your efforts and establish a consistent schedule to ensure their timely execution. Harsh weather

can quickly create roofing issues and also affect interior spaces with water pipes running through unconditioned or poorly insulated areas. Monitor temperatures in these areas and take appropriate measures such as wrapping pipes, insulating spaces, and opening doors that communicate with heated spaces.

Don't forget your vacant buildings. The longer a building goes with an undetected condition, the greater the accumulated damage. Ask NYMIR or your insurer for a checklist to avoid anything getting overlooked.

In summary, a defined preventive maintenance plan for your roofs can catch damage before it leads to greater loss, thus saving money, down time, inconvenience or actual loss of service. Documenting your efforts can keep warranties intact and will help make the case for appropriate insurance claims should they arise. □

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Supervisors, Board Members & Planning & Zoning Boards

Not your Average Farmer's Market – Cannabis "Showcases" • Legal Alert: Court of Appeals Restores Planning Board's Authority in *Smith v Town of Thompson Planning Board*

Assessors

AI in Assessment Administration: From Data Management to Decision Support • Grievance Day 2026: Process Overview and Court of Appeals Update

Town Justices

A Reasonable Excuse for a Default and a Potentially Meritorious Defense Required to Vacate a Judgment under CPLR 5015 (A) (1) • Principles of Res Judicata permit only one bite of the apple.

Upcoming Event Information & Registration

Supervisors, Board Member & Planning & Zoning Boards

Not your Average Farmer's Market – Cannabis "Showcases"

The Office of Cannabis Management [adopted new regulations](#) allowing licensed cannabis retailers to host farmers-market-style "showcase" events where cultivators and processors can display and sell their products. The rules stem from a law reviving a short-lived 2023 program that was originally created to give cannabis manufacturers an outlet to move products before enough retail dispensaries were open to carry them. To host an event, a retailer must apply for a permit at least 45 days in advance and partner with at least one licensed cultivator and at least one licensed processor. All sales must be processed by the licensed retailer, and the event must be located at least 200 feet from the nearest dispensary.

Towns should be aware that municipal approval is required before any showcase event can take place. A licensed retailer must obtain signed municipal approval as part of the permitting process, which gives towns a role in deciding whether and where these events occur in their communities. Permits are valid for up to 14 consecutive days, and no single location may host more than 45 days of events per calendar year. On-site consumption and sampling are not permitted. ☐

Legal Alert: Court of Appeals Restores Planning Board's Authority in *Smith v Town of Thompson Planning Board*

In April, the Court of Appeals handed down a big win for local governments and unanimously reversed the Appellate Division in *Matter of Smith v. Town of Thompson Planning Board*, reinstating the Supreme Court's judgment in favor of the Planning Board. The case arose when a developer sought site plan approval and a special use permit to build two warehouse buildings in the Town of Thompson, and the Planning Board granted approval conditioned on the property's use as a warehouse under the Town Code, which separately defines and prohibits distribution centers in the zone. The state's highest court held that there was no error of law or abuse of discretion in that determination. The petitioners (a group of property owners) had argued that the number and density of loading docks in the project proposal "likely" indicated the actual use would differ from what the Board approved, but the Court of Appeals found that speculation insufficient to disturb a rational administrative determination. The Board's SEQRA review, conducted on the same warehouse-limited basis, was likewise upheld.

NYAOT filed an amicus brief in this case, as the Third Department's decision put planning boards and local governments statewide in an untenable position, treating routine application review as code interpretation and opening the door to ZBA referral requirements, even where no genuine ambiguity in the code existed. The Court of Appeals' decision reaffirms the proper standard of review under CPLR Article 78 and the deference courts owe to rational planning board determinations supported by the record. Local governments can now count on the

fact that when a board conditions approval on a specific permitted use and bases its SEQRA review on that same limitation, it has adhered to the law, and a challenger's speculation about what an applicant might do in the future is not grounds for reversal. ☐

Assessors

AI in Assessment Administration: From Data Management to Decision Support

By David M. Barnett, MAI, SRA, CEO, Partner, GAR Associates

Artificial intelligence is often described as a future disruptor in real estate. In assessment administration, however, AI is already at work, not as a replacement for professional judgment, but as a decision-support layer integrated into modern CAMA and analytics platforms.

For assessors, the practical question is not whether AI will transform the profession, but how thoughtfully it is embedded into systems that support equity, defensibility, and operational efficiency. Today, AI's most meaningful impact in assessment is occurring in three areas: model performance, data integrity, and workflow automation.

Strengthening Mass Appraisal Models

Contemporary CAMA systems increasingly incorporate machine learning techniques alongside traditional regression approaches. These tools are not speculative, they are operational in many jurisdictions. Applied uses include:

- Automated sales qualification support and anomaly detection
- Market segmentation analysis
- Continuous model recalibration as new verified sales enter the system
- Statistical diagnostics that highlight instability or overfitting

Rather than replacing established mass appraisal methodology, these tools enhance it. Assessors retain control over model structure and calibration while benefiting from improved pattern recognition and faster iteration cycles.

The result is often reduced sales ratio dispersion, improved price-related differential performance, and more defensible equalization outcomes. When embedded

directly within the assessment platform rather than deployed as an external add-on, these tools also support consistent model governance, documentation, and auditability.

When embedded directly within the assessment platform, rather than as an external add-on, these tools support consistent model governance and auditability.

Moving From Data Storage to Data Intelligence

Assessment offices have always managed large datasets: parcel characteristics, sales, permits, exemptions, GIS layers, and tax roll history. What is changing is how actively those datasets are monitored and analyzed. AI-enabled platforms now support:

- Permit-to-roll reconciliation alerts
- Change detection using updated imagery feeds
- Automated flagging of inconsistent property attributes
- Pattern analysis across neighborhoods or property classes
- Forecasting tools tied to valuation and levy projections

Instead of relying solely on periodic review cycles, offices can now monitor data conditions continuously. This shift from static record-keeping to dynamic data intelligence improves both equity and operational efficiency. It allows staff to focus attention where measurable risk or variance exists, rather than applying a manual review across all parcels.

Embedded Analytics for Oversight and Equity

One of the most practical AI applications in assessment today is equity monitoring. Integrated analytics dashboards allow offices to track valuation performance by neighborhood, property class, and value range while identifying assessment drift between revaluation cycles.

More advanced systems can surface emerging disparities before they become systemic and model the impact of market shifts or policy changes. By continuously monitoring ratio performance and value trends, offices move from reactive appeal management to proactive equity governance.

These tools help offices proactively manage fairness rather than reacting to appeal outcomes after the fact. Importantly, when analytics are built directly into the assessment platform, transparency improves. Supervisors

can trace valuation drivers, review statistical outputs, and document decision pathways — strengthening defensibility during board review or litigation

Supporting Planning and Policy Analysis

Assessment data plays a growing role in broader local government planning decisions. AI-supported analytics now assist in:

- Modeling tax base impact from rezoning proposals
- Identifying redevelopment candidates based on parcel characteristics
- Evaluating density scenarios against current improvement patterns
- Forecasting long-term revenue implications of land use shifts

While these applications do not automate planning decisions, they provide quantifiable insight that informs policy discussions. When assessment systems are integrated with GIS and analytical layers, they become strategic assets for the jurisdiction — not just valuation engines.

Public Transparency and Taxpayer Engagement

AI is also reshaping how property information is delivered to the public. Many jurisdictions now deploy integrated property portals that combine:

- Current and historical valuations
- Property characteristics
- Zoning classifications
- Sales history
- Appeal submission workflows
- Interactive valuation trend visualizations

Some platforms incorporate conversational interfaces that guide users through common questions about assessment methodology, exemptions, or appeal timelines. For assessment offices, these tools reduce repetitive inquiries while improving taxpayer understanding. Greater transparency often leads to more focused, data-driven appeal discussion

Internal Workflow Automation

Beyond valuation, AI is increasingly applied to administrative efficiency:

- Automated generation of board-ready reports
- Batch validation of property characteristic updates
- Appeal tracking and issue categorization
- Data normalization across legacy imports
- Predictive workload management during revaluation cycles

These workflow enhancements may not be visible externally, but they significantly improve staff productivity and consistency.

Maintaining Professional Guardrails

As AI tools become more embedded in assessment systems, governance remains essential. Assessment offices must ensure:

- Explainability of model outputs
- Documentation of calibration decisions
- Regular bias testing across property segments
- Secure handling of taxpayer data
- Clear separation between automated flagging and final valuation authority

AI should support professional expertise, not obscure it. When thoughtfully implemented within an integrated platform environment, AI increases transparency rather than diminishing it.

The Practical Path Forward

The evolution of assessment technology is less about dramatic disruption and more about steady integration. Modern platforms are moving toward:

- Continuous market monitoring rather than periodic recalibration
- Integrated analytics instead of exported spreadsheets
- Embedded anomaly detection rather than manual exception hunting
- Unified data environments that connect CAMA, GIS, analytics, and public-facing tools

In this environment, assessors transition from data managers to analytical supervisors, overseeing systems that surface risk, variance, and opportunity in real time. The fundamentals of assessment administration remain unchanged: equity, uniformity, transparency, and

defensibility.

AI, when embedded responsibly within modern assessment platforms, strengthens each of those principles. It is not redefining the profession, it is reinforcing it with better tools. □

GAR Associates LLC is a team of experts committed to conducting and performing municipal appraisals at a level of performance that fully meets the needs of their clients. GAR has offices in Williamsville, N.Y., and Clifton Park, N.Y.

Grievance Day 2026: Process Overview and Court of Appeals Update

Grievance Day falls on the fourth Tuesday in May for most towns, giving real property owners the opportunity to formally contest their assessments before the Board of Assessment Review (BAR). The process begins earlier in the year, when the assessor values all real property as of the taxable status date (March 1 in most towns) and files the tentative assessment roll on or before May 1. Property owners who believe their assessment is excessive, unequal, unlawful, or misclassified may file an RP-524 complaint and present their case to the BAR, a body of three to five members, the majority of whom must be neither town officers nor employees. The BAR must meet for a minimum of four hours between 9 a.m. and 10 p.m., with at least two of those hours falling after 6 p.m. to accommodate property owners who work during business hours. Property owners that are dissatisfied with the BAR's determination may seek judicial review under RPTL Article 7, either through a Small Claims Assessment Review proceeding (available to owner-occupants of one, two, or three-family residences under a certain assessment value) or a tax certiorari proceeding. The final assessment roll is delivered to the county by July 1 and used to calculate each property owner's tax liability once the budget is adopted and the levy is set.

A recent Court of Appeals decision illustrates why property owners must use the correct procedural vehicle when contesting an assessment. In *Matter of Bi-Coastal Properties, LLC v. Soliman* (2026 NY Slip Op 20366, April 2026), the owner of a New York City property sought review through a clerical error application under Administrative Code section 11-243 after the Department of Finance failed to apply a J-51 exemption and a corresponding physical value increase following window replacement work. When that application was denied, the owner commenced a CPLR Article 78 proceeding. The lower court initially sided with the owner, but the First Department

reversed, and the Court of Appeals affirmed for the locality, holding that the failure to apply a valuation adjustment or exemption is **not** a clerical error subject to administrative correction and Article 78 review. Instead, the exclusive remedy is an Article 7 proceeding, whether through a SCAR proceeding or a tax certiorari.

The takeaway for towns is that when the underlying complaint made by a property owner is that an exemption or valuation adjustment was not reflected in an assessment, RPTL Article 7 is the only available avenue, regardless of how the property owner characterizes the agency's omission. Any attempts to reframe overassessment claims as a clerical error in order to access the more expedient Article 78 route will not survive in court. □

Justices

By Anthony Provenzano, former Town Justice, Town of Rye

A Reasonable Excuse for a Default and a Potentially Meritorious Defense Required to Vacate a Judgment under CPLR 5015 (A) (1)

In *Mendez v. Jefferson*, the Appellate Term for the 2nd Department, 2024 NY Slip Op 50067, affirmed an order to vacate a judgment entered against the defendant in the Small Claims part of the Civil Court, based upon defendant's failure to answer or appear in the action, and restored the matter to the calendar.

In this matter the plaintiff commenced the small claims action for nonpayment of rent on September 19, 2014. Defendant did not answer or otherwise appear in the action. Following an inquest a default judgment was entered against defendant. After defendant's wages were garnished, defendant moved to vacate the default judgment and to restore the action to the calendar. In defendant's supporting affidavit the defendant averred that she had moved out of the subject premises in 2013, only owing two months of rent arrears, and that she had not been served in this action or otherwise made aware of the existence of this action until her wages were garnished. In opposition, plaintiff argued that, although plaintiff had taken defendant to court multiple times for not paying the rent, defendant had not appeared in court previously and had not paid the overdue rent. Additionally, plaintiff argued that when she had hired a marshal to open the apartment in 2017, it was discovered that defendant had left the apartment in "deplorable

condition.”

The court explained that to be relieved of her default, pursuant to CPLR 5015 (a) (i), defendant was required to demonstrate both a reasonable excuse for the default and a potentially meritorious defense to the action (*see Nationstar Mtge., LLC v. McLean*, 140 AD3d 1131 [2016]; *136-76 39th Ave., LLC v. Ai Ping Wu*, 55 Misc 3d 128[A], 2017 NY Slip Op 50363[U] [App Term, 2d Dept, 2d, 11th & 13th Jud Dists 2017]). The determination of what constitutes a reasonable excuse sufficient to vacate a default lies within the sound discretion of the motion court when considering the extent of the delay, whether there has been prejudice to the opposing party, whether there has been willfulness, and the strong public policy in favor of resolving cases on the merits (*see Matter of Gambardella v. Ortov Light.*, 278 AD2d 494 [2000]; *see also Hartzark v. Drive Variety, Inc.*, 21 AD3d 876, 876-877 [2005]).

The court in this case, found that the civil court did not improvidently exercise its discretion in determining that defendant demonstrated a reasonable excuse for her default. It also found that the defendant demonstrated a potentially meritorious defense to the action and that plaintiff has not demonstrated any basis to disturb the order. □

Principles of Res Judicata permit only one bite of the apple.

In *Akbulut v. Five Stars Serv. Solutions Corp.*, the Appellate Term for the 2nd Department, 2024 NY Slip Op 50117, reversed the judgment entered for the defendant in the small claims part of the civil court.

In this matter plaintiff commenced a small claims action against defendant and its owner/president after defendants allegedly failed to properly grade plaintiff's property and install a drywell at his house. At a nonjury trial, plaintiff testified that he hired another contractor to remedy the mistakes made by the defendants in failing to properly grade his backyard and install a drywell so as to prevent further flooding. Defendants argued, among other things, that there had been a prior arbitration with respect to the same work performed at plaintiff's home. In that commercial claim action filed by the defendant, arbitration was conducted pursuant to the rules of the chief judge (22 NYCRR) Part 28; defendant was awarded \$3,000 for money owed for work performed; and plaintiff was awarded a \$1,900 credit for “unsatisfactory results.” Furthermore, a motion by plaintiff to vacate the judgment

in that case was denied by the district court. At the close of evidence in the instant action, the district court entered a judgment in favor of plaintiff in the principal sum of \$4,716.72.

This court explained that in a small claims action, appellate review is limited to a determination of whether “substantial justice has ... been done between the parties according to the rules and principles of substantive law” (UDCA 1807; *see* UDCA 1804; *Ross v. Friedman*, 269 AD2d 584 [2000]; *Williams v. Roper*, 269 AD2d 125 [2000]).

The court concluded that the record did not support an award against the owner of the defendant corporation as there was no contract entered into between plaintiff and the owner, and the evidence showed that the defendant corporation provided the machinery and labor for the work performed on plaintiff's property. Moreover, the district court, as a court of limited jurisdiction, lacked jurisdiction to grant the equitable remedy of piercing the corporate veil (*see Battle v. Smith*, 35 Misc 3d 126[A], 2012 NY Slip Op 50566[U] [App Term, 2d Dept, 9th & 10th Jud Dists 2012]).

The court went on to explain that res judicata precludes the “reconsideration of claims actually litigated and resolved in a prior proceeding, as well as claims for different relief against the same party which arise out of the same factual grouping or transaction, and which should have or could have been resolved in the prior proceeding” (*Mahler v. Campagna*, 60 AD3d 1009, 1011 [2009]; *see also Jacobson Dev. Group, LLC v. Grossman*, 198 AD3d 956 [2021]; *Greenaway v. Clifton & Classon Apt. Corp.*, 191 AD3d 958 [2016]; *Ciraldo v. JP Morgan Chase Bank, N.A.*, 140 AD3d 912 [2016]). Arbitration awards can have a res judicata effect (*see Mahler v. Campagna*, 60 AD3d 1009).

The court here concluded that the record here sufficiently established that plaintiff and defendant corporation participated in a prior mandatory arbitration, that the current claim by plaintiff was based on the same facts and circumstances as in the prior arbitration, and that the claim of defective workmanship involved herein was actually litigated and adjudicated on the merits in that prior arbitration, following which defendant was credited with \$1,900 (*see Greenaway v. Clifton & Classon Apt. Corp.*, 191 AD3d 958; *Ciraldo v. JP Morgan Chase Bank, N.A.*, 140 AD3d 912). Under the circumstances, the doctrine of res judicata precludes the relitigation of plaintiff's claim against defendant corporation. □



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Our Mission

NYMEF empowers localities by investing in the next generation of municipal employees and promoting civic engagement. We do this by:

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- Raising awareness of the vital role local governments and their employees play

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The conference will run a full day on Tuesday and a half day on Wednesday. Breakfast, lunch and a reception will be provided on Tuesday, with breakfast offered on Wednesday. All meals included in the registration fee.

The conference will be held in conjunction with the New York Municipal Empowerment Foundation (NYMEF), which will host a fundraiser golf tournament on Monday, September 21, 2026 at Pinehaven Country Club, 1151 Silver Road, Guilderland, NY 12084. *Separate registration required.*

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Member Focus

New York State Town Officials Earn Statewide Certification

The New York Association of Towns would like to congratulate and recognize the following town officials that have completed the curriculum to earn the Association's certification as part of the Certified Town Official Program.



This past quarter, the following town officials received their certification after completing the requisite 20 credit hours across 10 categories at various Association-hosted conferences or Association-provided training.

- **Marie Little, Town Clerk, Town of Royalton**
- **Jennifer McGuire, Town Clerk/Collector, Town of Conewango**
- **Wayne McGuire, Supervisor, Town of Conewango**

Each town official completed courses in the following subject areas: *Assessor/RPT Issues; Attorney/Legal*

Good News Travels Fast - If you Share it!

You've done the work, made the impact, and gained the insight—now's your chance to share it. Whether it's a proud moment from your career, a fresh idea that sparked change, or a lesson learned the hard way, your story could inspire, educate, or simply connect with someone else in our community. And let's be honest: there's no better place to showcase the amazing things happening in our network than right here. So go ahead and brag a little! Tell us what you're working on. Share a win, a challenge, or even a quirky anecdote that only someone in your shoes would understand. Drop us a line, send us a story, or pitch an idea. We're all ears, and we're excited to help bring your voice to the page.

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For more information on our Certified Town Official Program, please email info@nytowns.org. □

Stillwater Town Clerk Honored by NYS Town Clerks Association

Danielle Cowin, town clerk, Town of Stillwater, has been awarded certification as a Registered Municipal Clerk (RMC) by the New York State Town Clerks Association for achieving its high educational, experience, and participatory requirements.

Cowin has been serving as town clerk since January 2022 and is also a member of the NYS Town Clerks Association.



She attained her designation as a Registered Municipal Clerk through a combination of numerous hours of education and leadership in various professional and civic organizations.

This statewide Certification Program was launched in 1997 in conjunction with the NYS Association of City and Village Clerks. The program aids municipal clerks in improving job performance and recognizes the professionalism of the municipal clerk's office. Specific education and experience requirements must be achieved before this prestigious designation of Registered Municipal Clerk is awarded. Qualifications of applicants are reviewed and approved by the NYS Town Clerks Certification Committee.

NOTE: Founded in 1982, the New York State Town Clerks Association is an organization dedicated to promoting the professional development of town clerks across the state as administrative leaders. Membership offers town clerks and their deputies encouragement, specialized assistance, and continuing education relative to professional and personal improvement that will enhance their ability to serve their constituency. Nearly 900 of the 933 towns in New York State are currently members. Over 20 RMC awards have been made in the past year. □

2026 TOWN CLERK of the Year



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Diana L. Quast

TOWN OF YORKTOWN



The New York State Town Clerks Association proudly recognizes Diana L. Quast as the 2026 Town Clerk of the Year. This prestigious award celebrates her unwavering commitment to public service, her leadership within the clerk community, and her lasting impact on the residents of Yorktown and beyond.



A CAREER OF SERVICE

- ✓ 10 years as Town Clerk of Yorktown
- ✓ 16 years as Deputy Town Clerk
- ✓ 26+ years as an active member of NYSTCA

She is also a member of the Westchester Putnam Town and City Clerks Association.



PROFESSIONAL EXCELLENCE

Diana's dedication to professional growth and excellence is reflected in her achievements:

- ★ Registered Municipal Clerk (RMC) - NYSTCA
- ★ Certified Municipal Clerk (CMC) - IIMC
- ★ Master Municipal Clerk (MMC) - IIMC

Her commitment to continuing education and mentorship has strengthened the clerk profession across New York State.



COMMUNITY IMPACT

Diana goes above and beyond her role, serving her community through:

- ✓ Mobile Clerk services for residents unable to travel
- ✓ Development of inclusive recreational spaces
- ✓ Senior Safety ID Card Program
- ✓ Volunteer work with local organizations including the VFW and community groups

Her work exemplifies what it means to be a dedicated public servant.



A WELL-DESERVED RECOGNITION

Nominated by colleagues, elected officials, and community members, Diana is widely respected for her professionalism, compassion, and leadership.

The NYSTCA proudly honors Diana L. Quast for her outstanding service and commitment to the Town of Yorktown and the State of New York.

Presented April 21, 2026
NEW YORK STATE TOWN CLERKS ASSOCIATION

Navigating Industrial Wastewater Pretreatment: Common Municipal Challenges and Practical Strategies

By Alexander Retzlaff, PE | Water/Wastewater Designer and Oliver Sugarman, EIT | Civil Engineer

Industrial wastewater pretreatment programs play a critical role in protecting municipal wastewater treatment systems, safeguarding local water bodies where treated effluent is discharged, and supporting compliance with the Clean Water Act. As communities grow and industrial activity evolves, many municipalities find themselves navigating industrial wastewater

pretreatment requirements with limited staff, aging program documents, and increasing regulatory expectations. Developing and maintaining an effective pretreatment program has become more complex than many municipalities anticipated. Understanding where pretreatment programs commonly struggle—and what approaches help municipalities address these challenges—can make the difference between a program that exists on paper and one that functions effectively over the long term.

The Municipal Reality of Industrial Wastewater Pretreatment

Municipal sanitary sewer systems receive wastewater from a wide range of users, including residential, institutional, commercial, and industrial sources. These systems convey the flow to a Publicly Owned Treatment Works (POTW)—the municipality’s wastewater treatment plant—where pollutants are removed before treated effluent is discharged to nearby surface waters or, in some cases, to groundwater.

While POTWs are generally designed to manage typical residential and commercial waste streams, industrial and nonconventional pollutants can place unexpected strain on treatment processes, infrastructure, and plant operators. Effective pretreatment—treating industrial wastewater before it enters a POTW—helps prevent these discharges from interfering with treatment processes, posing safety risks to plant personnel, or harming local rivers, lakes, and other receiving waters.

The United States Environmental Protection Agency



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Now Launching: Rural Communities Council

Virtual Kick-off: Wednesday, May 28 at 6:00 P.M.
Registration open now on www.nytowns.org

We’re proud to announce the launch of our new Rural Communities Council at the New York Association of Towns. NYAOT understands that rural towns face distinct challenges, from limited staff capacity and infrastructure needs to workforce shortages, funding barriers, and service delivery concerns. That is why we created the Rural Communities Council, a dedicated forum for town officials to discuss issues, share ideas, and help shape NYAOT’s advocacy, programming, and member resources for rural communities across New York State. Please join us for the Council’s first meeting on May 28 from 6:00 p.m. to 7:00 p.m. We know many town officials work other jobs, so this first meeting is being held in the evening to make it easier to participate.

At this meeting, we will:

- Discuss recurring concerns facing rural towns
- Identify possible NYAOT advocacy priorities;
- Discuss future programming, training, and member resources for rural communities

If you are unable to attend this event, no worries! We’ll share a recording - in the meantime, sign up for the Rural Communities Council mailing list!

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regulates industrial discharges through the National Pretreatment Program, set forth in 40 CFR Part 403. This regulation provides the framework for controlling non-domestic (such as industrial and commercial) wastewater inputs into municipal sewer systems to protect POTW infrastructure and ensure the goals of the Clean Water Act are attained.

Responsibility for developing, implementing, and maintaining industrial pretreatment programs is shared among federal, state, and local agencies, as well as industrial users and the general public, depending on the locality. However, the day-to-day operations of these programs, including permitting, monitoring, and coordination with industrial users, often fall largely on municipal staff, who must balance these regulatory obligations with operational demands.

Where Pretreatment Programs Typically Struggle

Experience across municipalities shows that pretreatment programs require continual attention. A common misconception is that once a program is approved, only minor updates are needed. In reality, industrial activity, treatment system capabilities, and regulatory expectations evolve over time, requiring ongoing review and adjustment.

Day-to-day program demands can include routine sampling and compliance report reviews, recurring permit updates, enforcement response actions when violations occur, and consistent communication between industrial users and POTW staff. For many municipalities, limited staffing and specialized expertise make it difficult to keep pace with these demands.

Documentation and follow-through also present ongoing challenges. Maintaining complete records, tracking corrective actions, and coordinating internally across departments are essential for consistent, audit-ready program management; however, this can be difficult to sustain without clear procedures and dedicated resources.

Another common obstacle involves maintaining accurate, up-to-date information on industrial users. Reliance on outdated surveys or incomplete process information can leave gaps in understanding how industrial operations affect the treatment system. In addition, misunderstanding what constitutes a Significant Industrial User—generally an industrial discharger subject to specific pretreatment regulatory requirements—or when categorical standards apply can result in permitting or monitoring deficiencies that surface during inspections or audits.

What Successful Municipalities Do Differently

While pretreatment programs vary by municipality, successful programs tend to share several common characteristics.

Clear, Usable Procedures

Strong programs are built around practical procedures that support consistent implementation—even as staff roles or personnel change. Program documents serve as working tools, not just compliance artifacts.

For example, in Lawrenceville, Virginia, the Town needed to create a pretreatment program within a tight regulatory timeframe to meet Virginia Department of Environmental Quality (VA DEQ) requirements. The focus was on creating clear, defensible documentation that could be sustained over time. With support from VA DEQ, an industry representative, and technical experts, the Town developed a complete program framework, including permits and an updated sewer use ordinance. This structure allowed Lawrenceville to secure program approval and establish procedures that support long-term administration.

Monitoring and Enforcement

Well-defined sampling protocols and consistent review of monitoring data support informed decision-making. Clear enforcement response plans help municipal staff respond to violations in a fair, predictable manner, reinforcing accountability while maintaining transparency.

Proactive Communication

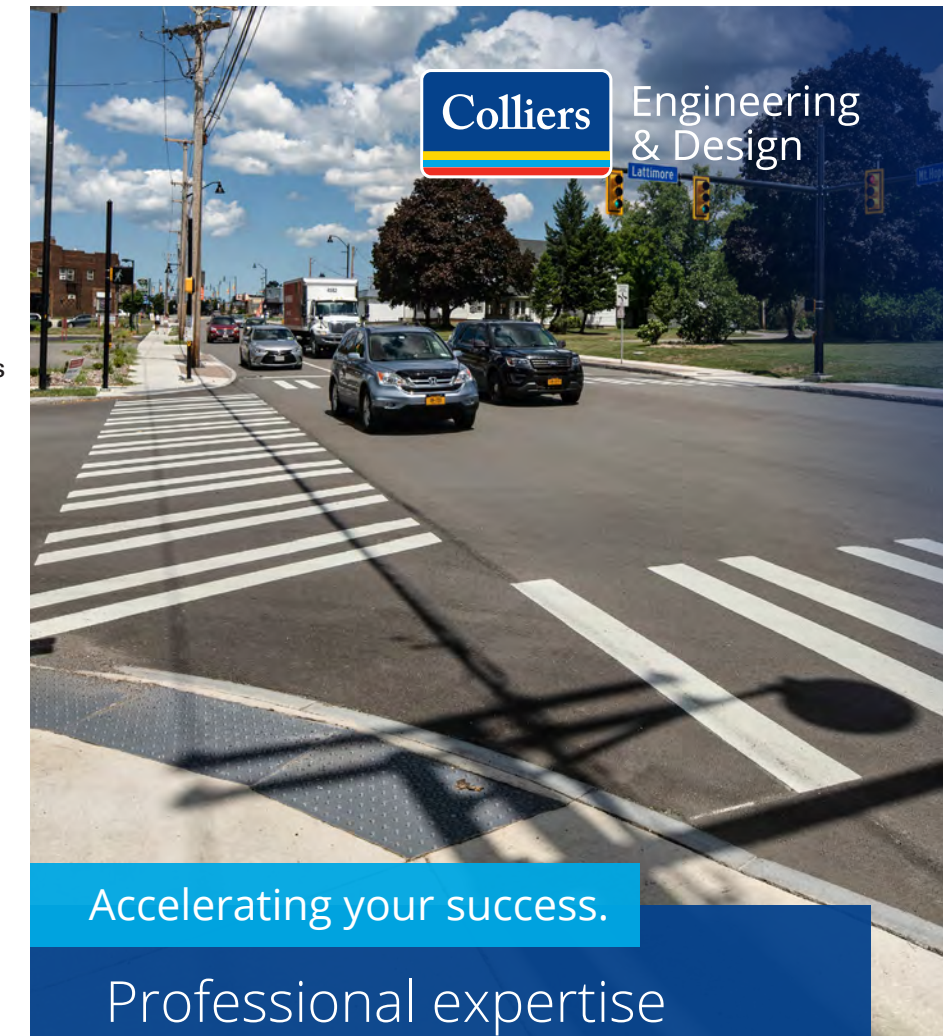
Open lines of dialogue between POTW staff, industrial users, and regulators help align expectations and address issues early, before they escalate into violations. Meaningful industrial user outreach, particularly during program updates or operational changes, reinforces shared responsibility for protecting municipal infrastructure and the environment.

In Hornell, New York, a multi-year compliance schedule required the City to strengthen and formalize its pretreatment program to meet the New York State Department of Environmental Conservation (NYSDEC) approval requirements. With multiple industrial users across a range of sectors, both communication and careful coordination were critical to ensure all stakeholders understood

program requirements and could implement updates effectively. The City partnered with NYSDEC and industry representatives to document its program, update permits that had not been revised since the 1980s, and amend the sewer use ordinance. These updates improved operational clarity and aligned the pretreatment program with regulatory expectations, positioning the City for long-term compliance.

Consultant Support When Needed

In many cases, municipalities also benefit from engineering consultant support, particularly when regulations or local priorities change, industrial activity



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increases, or internal staffing is limited. Consultants such as LaBella can help pretreatment programs avoid common pitfalls and strengthen long-term program performance.

In the Town of Erwin, New York, aging program documents, expiring permits, and changes in industrial activity and wastewater flows prompted updates to the pretreatment program. By working closely with the NYSDEC, industrial users, and LaBella, the Town refreshed procedures, renewed permits, and implemented ongoing compliance monitoring. These efforts help Erwin keep documentation current and support reliable wastewater treatment plant operations.

Adapting to Regulatory and Industry Trends

While successful municipalities follow best practices, even well-structured pretreatment programs are influenced by evolving regulatory and industry trends.

Increasing attention to emerging contaminants—such as PFAS (per- and polyfluoroalkyl substances)—alongside chlorinated organics and industrial solvents has heightened expectations for municipal awareness and proactive evaluation, even as formal regulatory limits continue to develop.

Technology is also changing how pretreatment programs operate. Automated samplers, real-time

monitoring tools, and cloud-based reporting systems enable more precise data collection and quicker issue resolution. At the same time, audits and inspections increasingly emphasize documented procedures, clear enforcement response plans, reliable sampling data, and transparent permitting decisions, reinforcing the importance of consistent program management.

For municipalities, these trends point to the need to design pretreatment programs that are adaptable, well-documented, and scalable over time.

Outcomes Municipalities Can Expect

When industrial wastewater pretreatment programs are thoughtfully structured and actively managed, the benefits are tangible. Municipalities often see improved compliance rates, reduced pollutant loading to treatment systems, and greater confidence during regulatory audits. Clear procedures and consistent communication can also lead to more efficient permitting and monitoring workflows, easing administrative burdens on staff.

Beyond improved compliance, strong pretreatment programs help protect treatment infrastructure, safeguard environmental quality, and reinforce trust among municipal staff, industry partners, and the broader community they collectively serve. □

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WOMEN'S



Leadership Caucus

We'd like to recognize **Perinton Town Supervisor Jennifer Townsend** and **Niskayuna Town Supervisor Erin Cassidy-Dorion** for joining us in Canandaigua and Albany, respectively, for an early-morning casual and interactive conversation titled Coffee & Candor at our Finance & Personnel Schools. Each supervisor shared some of their background and experiences getting into local government, challenges they have faced including balancing family with public service and avoiding burnout and setting boundaries. Both Jenn and Erin shared interesting insights and helpful lessons - thank you both for your time!

Jenn and Erin are part of a larger group of founding officers of the Women's Leadership Caucus, which is dedicated to connecting, supporting, and advancing women serving in town government across New York. One of the main goals will be to develop training curricula and build other resources of value to women in local government.

FOUNDING OFFICERS

Angie Carpenter, Town Supervisor, Islip, (Suffolk County); **Erin Cassidy-Dorion, Town Supervisor, Niskayuna**, (Schenectady County); **Tiffany Lewis, Town Board Member, Cheektowaga**, (Erie County); **Mona Montal, Chief of Staff, Ramapo** (Rockland County); and **Jen Townsend, Town Supervisor, Perinton** (Monroe County).

ABOUT THE CAUCUS

The caucus was formally announced at NYAOT's 2026 Annual Meeting & Training School in New York City in February 2026 - the same conference at which, for the first time in NYAOT's 93-year history, the delegation elected an all-female slate of officers to its governing board.

- Historic milestone: The 2026 Annual Meeting marked the first all-female elected officer slate in NYAOT's history.
- The Caucus is a forum for women leaders in local

government to collaborate, share expertise, and influence NYAOT programming.

- Founding officers represent towns across the state: from Long Island to the Capital Region, Western New York, the Hudson Valley, and the Finger Lakes.
- NYAOT supports the Caucus with staff resources, communications, and programming infrastructure.
- The Caucus will hold both officer-only sessions and meetings open to all female NYAOT members.

The next Women's Leadership Caucus Roundtable is scheduled for June 26 and is virtual. All interested NYAOT members may sign up at www.nytowns.org.

To find out more about the caucus, please feel free to reach out to either NYAOT staff liaison, Association Counsel Katie Hodgdon or Director of Communications & Member Engagement Libby Schirmer. ☐



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EFC Announces \$75 Million for Flood Mitigation, Resiliency Projects



EFC President & CEO
Maureen A. Coleman recently announced that \$75 million in grant funding is available through

the Green Resiliency and Green Innovation Grant Programs. This announcement underscores EFC's continued commitment to protecting New Yorkers from flooding, improving water quality, and providing municipalities with resources to affordably modernize critical systems.

EFC's Community Assistance Teams are available to help municipalities navigate the application process. Applicants are strongly encouraged to review all requirements and submit applications early to avoid any last-minute issues.

GREEN RESILIENCY GRANTS

Helps fund transformative stormwater management projects that improve water quality and mitigate the effects of extreme weather.

May fund up to 90% of eligible project costs, with a minimum of \$1 million up to a maximum of \$10 million per project.

Funded by the Clean Water, Clean Air, and Green Jobs Environmental Bond Act.

GREEN INNOVATION GRANT PROGRAM

Helps fund projects that improve water quality and implement green stormwater infrastructure, energy efficiency, or water efficiency so communities can seek financing through the Clean Water State Revolving Fund or funding from other sources.

May fund between 50-90% of eligible project costs, up to a maximum of \$3 million per project.

Funded by the Clean Water State Revolving Fund.

Applicants submit a single application for both Green Resiliency Grants and the Green Innovation Grant Program. Eligible projects will be considered for funding under either program. This allows EFC to consider an application under the most suitable grant program based on the project scope. Applications are due June 12.

For information on these and other grant opportunities through EFC, please visit their website at <https://efc.ny.gov/grg>

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