



## 1 INTRODUCTION:

Shared services have been a longstanding priority for the County of Otsego and the thirty-four municipalities within the county (twenty-four towns, nine villages, one city). Employees and municipal officials actively search for ways to eliminate the duplication of efforts, data, and resources to ultimately reduce the costs of property taxes for residents in this rural county that has experienced a 3.5 percent reduction in population between the 2010 Census and 2017 (Census 2017) which equates to a reduction in the tax base (primarily sales tax revenues). Not only is Otsego County losing residents, but the reduction of positions and departments at the county and local level have increased the difficulty of maintaining the level of service residents are accustomed to having.

Historically, Otsego County municipal leaders have embraced the opportunity to share services inside, and outside of the county to provide the critical and necessary services the residents are dependent upon. Examples of past shared services aimed at reducing taxpayer dollars include recycling collection at the twelve municipal transfer stations and contracting with the Onondaga County Department of Purchase to fulfill the county's purchasing needs. Otsego County averages seven-hundred tons in recycling per year which equates to approximately \$94,500 per year in recycling collection, transport, and processing costs to the twelve municipalities with transfer stations (excluding the two County-owned transfer stations). In 2017, Otsego County contracted with the Onondaga County Division of Purchase to provide purchasing and administrative services consistent with applicable laws including General Municipal Law, Section 119-O, and Article 5-A Public Contracts. The costs of these purchasing services (\$18,000 in 2017, \$30,000 in 2018) are well below the cost of a Purchasing Agent staffed locally in Otsego County.

The recent state policy of the 2 percent tax cap has financially limited the services that municipalities are able to provide for residents. This has set the stage for Governor Cuomo's County-wide Shared Services Initiative (CWSSI) that requires a local Shared Services Panel to develop a Shared Services Plan with the ultimate goal of saving taxpayer dollars. The 2018 Otsego County Property Tax Savings Plan (hereinafter "Plan") has identified six shared services projects that will reduce taxpayer dollars and be eligible for matching funds from New York State (Shared 2018). These projects include: Otsego County Highway Asset Management Program; Municipal Accounting Software Allocation; County/Municipal Email Share; Public Safety Records Management Software; Shared Public Works Equipment Agreement; and Otsego County Stream Management Program.



## 2 OVERVIEW OF CWSSI:

The CWSSI was enacted in the Fiscal Year 2018 New York State Budget as a required initiative of fifty-seven counties in the State (excluding counties in New York City) to implement shared services and cooperative agreement amongst the municipalities and school districts within the county. The goal of the Plan is saving taxpayer dollars by improving efficiencies, eliminating duplication, and shared common services amongst local governments.

A Shared Service Panel is established as part of the CWSSI in each county with the Chief Executive Official of the county chairing the committee, and each chief elected official of every municipality serving as a member (Shared 2018). The Panel will aid in the development of the Plan, eventually leading to a vote with a quorum of the officials from Otsego County (35 member Panel) to vote to approve or disapprove the Plan. Projects included in the Plan that demonstrate actual savings become eligible for a one-time match of the net savings in the 2019 calendar year. The county and all of the participating local governments in a project must collectively apply for the matching funding, and the reimbursement will be distributed equally amongst participating municipalities (ibid).

In Otsego County, the Shared Services Panel (hereinafter "Panel") is comprised of the Chair of the County Board of Representatives (hereinafter "Chair"), Mayor of the City of Oneonta, Mayors of the nine villages, and Supervisors of the twenty-four towns. In the accelerated Plan development process, involvement and participation of all Panel members is a high priority for the success of the Plan.



3 PLAN DEVELOPMENT:

As required by the CWSSI, the Chair and the County Planning Department assembled the thirty-five member Panel consisting of the Chief Elected Official of each municipality. It is the responsibility of the Panel to guide the development of the Plan, leading to the final adoption of the Plan with a majority vote of members (minimum eighteen votes). The thirty-five Panel members and the municipality they are representing follows:

**County Legislative Chair**  
David Bliss

**Representing**  
Otsego County

- Mayors**  
 Louis Guido  
 Ellen Tillapaugh  
 Kenneth Nolan  
 Frank Kovacs  
 Brian Pokorny  
 Michael Newell  
 Ernest Kroll  
 Ronald Frohne, II  
 David Welch  
 Gary Herzig

- Representing**  
 Cherry Valley (V)  
 Cooperstown  
 Gilbertsville  
 Laurens (V)  
 Milford (V)  
 Morris (V)  
 Otego (V)  
 Richfield Springs  
 Unadilla (V)  
 City of Oneonta

- Town Supervisors**  
 Russell McCall  
 Bruce Giuda  
 Thomas Garretson  
 Paul Strenn  
 Russell Dutcher  
 Doree VanTassel  
 Robert O'Brien  
 Patricia Brockway  
 Harold Palmer  
 Joseph Harris  
 Bernadette Atwell  
 Lynn Joy  
 Edward Lentz  
 Robert Wood  
 Joseph Hurlburt, Sr.  
 Meg Kiernan  
 Michael Berthel  
 Todd Lewis  
 Paul Palumbo  
 Patti Gustafson  
 Bill Freeland  
 George Denys  
 Bryan Larrabee  
 Donald Lindberg

- Representing**  
 Burlington  
 Butternuts  
 Cherry Valley (T)  
 Decatur  
 Edmeston  
 Exeter  
 Hartwick  
 Laurens (T)  
 Maryland  
 Middlefield  
 Milford (T)  
 Morris (T)  
 New Lisbon  
 Oneonta (T)  
 Otego (T)  
 Otsego  
 Pittsfield  
 Plainfield  
 Richfield  
 Roseboom  
 Springfield  
 Unadilla (T)  
 Westford  
 Worcester



3.1 NEW YORK STATE DEPARTMENT OF STATE MEETING:

The Chair and the Otsego County Planning Department had an initial plan development meeting with the New York State Department of State (DOS) on July 18, 2018. At this meeting the county was informed that the Plan would need to be developed and adopted on an accelerated schedule. An initial draft needs to be completed by August 1, 2018, and the Final Plan needs to be adopted by a majority of the Panel by September 15, 2018.

3.2 PANEL MEETINGS:

Otsego County will hold three Panel meetings (Table 1) to develop, review, and adopt the Plan. All Panel members received an invitation to the kick-off meeting that was held July 31. Telephone and electronic correspondence will take place between the Panel meetings to progress the projects and Plan to the approval and adoption phase.

Table 1: Panel meeting schedule

Meeting No.	Topic	Date, Time, Location
Panel Meeting 1	Project kickoff and CWSSI overview; discussion of projects; Plan development; Panel responsibilities	7/31/18, 2:00 PM, ONC BOCES
Panel Meeting 2	Draft Plan review; review of anticipated savings; county and municipal benefits	8/21/18, 7:00 PM, Meadows Classroom A
Panel Meeting 3	Vote on Final Plan	9/6/2018 Meadows Classroom A

In addition to the Panel members, all Otsego County Representatives, a CSEA union representative, and the administration at Otsego-Northern Catskills BOCES received invitations to the kick-off meeting. The Kick-off Meeting was held at ONC BOCES and thirty-eight municipal and school district representatives attended (ten Chief Elected Officials). An overview of the program was presented and then specifically the draft Plan for Otsego County. The six projects sparked conversations and local municipalities and the Soil and Water Conservation District presented additional projects to be added to the plan.

On August 1 the draft Plan was presented to the Otsego County Board of Representatives (BOR). The identified projects of the Plan, and the timeline was presented to the BOR. All members were asked to review the draft Plan and provide comments in writing by August 17, 2018.

[Insert discussion of Panel Meeting 3—plan approval]



3.3 PLAN DEVELOPMENT:

Otsego County initiated the development of the Plan following the July 18 meeting with the DOS. With the limited timeframe, the Chair, Otsego County Planning Department, Director of I.T., and the County Treasurer discussed a number of potential projects that could be included in the Plan. Projects have to be implemented in the 2019 calendar year, and the one-time reimbursement is calculated from January 1-December 31 2019. The Chair, Otsego County Planning Department, Director of I.T., and County Treasurer met again on July 24 and decided on presenting six viable projects that have the potential to save taxpayer dollars to the Panel to review and discuss at the kick-off meeting. The six projects include:

1. Otsego County Highway Asset Management Program;
2. Municipal Accounting Software Distribution;
3. County/Municipal Email Share;
4. Public Safety Records Management Software;
5. Shared Public Works Equipment Agreement; and
6. Otsego County Stream Management Program

A number of other projects were discussed but were not included in the 2018 Plan as implementation and tax savings will likely occur in 2020 or beyond. These projects were submitted through other state funding opportunities (e.g. Municipal Consolidation and Efficiency Competition; Municipal Restructuring Fund) and await a notification of Phase II funding in each program before implementation.

3.4 PUBLIC HEARINGS:

The Chair scheduled three public hearings (Table 2) to provide the public the opportunity to discuss and comment on the Plan. Notifications of the Public Hearings were posted in two official newspapers of the county, The Daily Star, and The Freeman’s Journal. In addition to the newspaper postings, the Public Hearing notification was posted on the information bulletin board at the Main County Office Complex.

Table 2: Public Hearing schedule

Public Hearing No.	Date, Time, Location
Public Hearing 1	August 1, 9:45 AM, Otsego County Board Chambers
Public Hearing 2	August 27, 12:45 PM, Otsego County Board Chambers
Public Hearing 3	September 5, 9:45 AM, Otsego County Board Chambers



### 3.5 PLAN REVIEW:

The Panel was presented the draft Plan at the July 31 meeting. The rough draft Plan was considered the working guideline for the review and discussion of the Plan at the meeting. Initial comments and edits were made following the Panel meeting. A more complete draft of the Plan was presented to the County Board of Representatives on August 1, 2018 by the Chair. The Panel and Board of Representatives were asked to find the draft Plan and a timeline for the Plan on the County's website. Written comments need to be received by August 17, 2018.

The draft plan was distributed to the Panel members prior to the second meeting for review. Panel meeting 2 was held [insert date; add discussion of draft Plan review]. Final comments and suggestions were taken for the completion of the Final Plan.

### 3.6 PANEL VOTE:

A majority of the thirty-five Panel members must be present and provide their vote in writing for the approval or disapproval of the Plan. Prior to the final vote, each Panel member has the opportunity to remove any action from the Plan that may adversely affect the unit of government they represent. A written notice of removal must be provided in writing to the Chair before September 6, 2018.

[Add language on approval and reference Appendix A sheet for vote tally]



4 PLAN PROJECT SUMMARIES:

Calculated tax savings for 2019, 2020, and then recurring savings are summarized by project in Table 3.

Table 3: Project savings summary

Shared Service Project	2019 Tax Savings	2020 Tax Savings	Recurring Savings
Otsego County Highway Asset Management Program	\$134,394	\$71,110	71,110
Municipal Accounting Software Distribution	\$79,900	TBD	TBD
County/Municipal Email Share	\$33,966	\$9,000	\$9,000
Public Safety Records Management Software	\$37,000	\$3,000	\$3,000
Shared Public Works Equipment Agreement	\$333,500	TBD	TBD
Otsego County Stream Management Program	TBD	TBD	TBD
<b>Total Tax Savings Estimates:</b>	<b>\$618,760</b>	<b>\$83,110</b>	<b>\$83,110</b>



4.1 PROJECT WORKSHEETS

Shared Service Worksheets

**Project 1: Otsego County Highway Asset Management Program**  
Category: Software; Public Works Estimated Start Date: January 2019

Participating Municipalities:

County: Otsego County;  
Towns: Burlington, Decatur, Edmeston, Exeter, Hartwick, Middlefield, New Lisbon, Otego, Springfield, Unadilla, Westford;  
Villages: Cooperstown, Milford

Project Description:

The Otsego County Highway Asset Management Program (HAMP) is based on collecting and analyzing municipal-owned assets and developing an asset management plan for Otsego County and participating municipalities. Highway Assets include but are not limited to: pavement conditions; culverts; sign inventory; and equipment inventory. Thousands of individual assets are in the County with no information on the location or condition. Otsego County will use relational databases through the ArcGIS Online platform to store, edit, and manipulate collected records at the county and municipal level.

Otsego County will be providing municipalities with access to a number of platforms and solutions through the shared licensing agreement with ESRI. The software and services would likely exceed any municipality's budget to purchase this platform in Otsego County. Recurring savings will continue over the lifetime of the program as hardware, software, and maintenance will not have to be purchased by the individual municipalities. Otsego County will be serving as the data repository and assisting in maintaining the datasets.

Taxpayer dollars will be saved by collecting, and analyzing the state of the assets. Traffic control devices are an area of potential savings once the program is implemented by replacing signs when there is an actual need instead of a scheduled replacement (e.g. every 10 years).

Needs Assessment:

Municipal resolutions; software architecture (county); survey of available hardware (participating municipalities); data collection and implementation (county/municipalities)

Estimated Savings:

2019	2020
\$134,394	\$71,110

Notes:

Software savings determined through Rough Order of Magnitude for municipal-level ArcGIS Online platform.



### Shared Service Worksheets

**Project 2: Municipal Accounting Software Distribution**  
 Category: Software; Financial Management Estimated Start Date: 2019

Participating Municipalities:

County: Otsego County;  
 Village: TBD  
 Town: TBD  
 City: TBD

Project Description:

The Otsego County Treasurer's Office is the only county office in New York State using Microsoft Dynamics Greater Plains (GP) software. Microsoft GP is not a municipal accounting package, it is designed to be used by businesses for accounting purposes. Changes in the NYS tax law require customizing the software to be up-to-date which a costly, and time-consuming endeavor is for the Treasurer's Office and the Department of I.T. Otsego County is pursuing a new municipal treasury that is intended to be used for municipal accounting purposes, and share the licensing with local municipalities and potentially school districts.

Municipalities and school districts are using a number of different accounting systems (e.g. Allen Tunnell) to manage their budgeting, payroll, and property/school tax needs. Microsoft GP is not compatible with the datasets exported by the municipalities and school districts, and reformatting of the data, or other steps to import creates a scenario for data corruption or loss. Otsego County will procure a software package that will provide NYS municipal accounting needs, but also provides the necessary tax software that can be shared with all municipalities and school districts in the county. License sharing will provide significant savings to the municipalities, and assurance of data compatibility and accuracy to the Treasurer's Office. Further, the project may be able to be streamlined with the County's ArcGIS Online endeavor to provide plug-and-play capabilities to the municipalities; Office of Real Property Tax Services, and the Treasurer's Office.

Needs Assessment:

Memoranda of Agreement; survey of available hardware (municipalities/school districts); calculated savings (municipalities); plug-and-play capabilities

Estimated Savings:

2019	2020
\$79,900	TBD

Notes:

Soft costs may be saved by Otsego County Department of I.T. by eliminating customization of Microsoft GP. Price only includes tax software, not municipal accounting package with twenty participating municipalities.



### Shared Service Worksheets

**Project 3: County/Municipal Email Share**  
Category: Software Estimated Start Date: 2019

Participating Municipalities:

County: Otsego County;  
Town: Hartwick;  
Village: Cooperstown, Milford

Project Description:

Municipalities in Otsego County use a number of email services ranging from proprietary to basic, free accounts. The free accounts are not compliant with the law as they do not providing archival or records management. Safety issues are also a concern for the municipal entities that usually do not have dedicated staff to support their I.T. services.

Otsego County has sufficient licenses to share this service with municipalities. Additional licenses can be added at a very minimal cost if needed (approximately \$8/license). By providing this service, Otsego County will bring the municipality to compliance with records management requirements, and alleviate the need for the municipality to purchase a licensing fee, pay yearly maintenance, and acquire a server. Otsego County Department of I.T. also has full-time staff to assist with municipal needs that otherwise would be contracted.

Needs Assessment:

Memoranda of Agreement(s); survey of available hardware/software (municipality)

Estimated Savings:

2019	2020
\$33,966	\$9,000

Notes:

Taxpayer savings calculated on the price of a server, licensing fees, and maintenance fees.



### Shared Service Worksheets

**Project 4: Public Safety Records Management Software**  
Category: Software Estimated Start Date: 2019

Participating Municipalities:

County: Otsego County;  
Village: Cooperstown

Project Description:

Otsego County intends to replace the current State Justice Statistics (SJS) program with another records management software that will enhance the sharing of information between law enforcement agencies. The SJS program was intended to enhance law enforcement’s capacity to address criminal justice activities through the collection and analysis of data (Bureau 2018), but the ability to share information between the Otsego County Sheriff's Department and local jurisdictions is limited.

Otsego County will own the license with the chosen vendor, and will have the ability to share licensing with the Cooperstown Police Department and other participating jurisdictions. All law enforcement agencies in Otsego County will now have access to a shared database of all criminal justice interactions. Public safety is greatly enhanced by this project, but there is also taxpayer savings to the Village of Cooperstown (and other participating municipalities) as software, data conversion, and the purchase of a server will be eliminated by the County/Village partnership.

Needs Assessment:

Memoranda of Agreement; survey of available hardware (municipality)

Estimated Savings:

2019	2020
\$37,000	\$3,000

Notes:

Taxpayer savings calculated off estimated price of software, data conversion, and price of server.



### Shared Service Worksheets

**Project 5: Shared Public Works Equipment Agreement**  
 Category: Public Works Estimated Start Date:  
 2019

Participating Municipalities:

Village: Cooperstown, Milford

Project Description:

The Village of Milford has faced many challenges in recent years in the maintenance of their roadways and infrastructure. Located on the main thoroughfare (State Highway 28) of Otsego County, and being in close proximity to two of the largest Little League baseball complexes in the country has led to a large increase in the volume of traffic. More vehicles equates to dirtier roads, and more debris in the culvert systems servicing the village roads. To alleviate these problems, the village planned on purchasing a combination street sweep/catch basin cleaner truck, and a crack sealing trailer.

It is not sensible for the village to purchase a a combination truck and a crack sealer trailer that is needed to provide the necessary maintenance. The tax-base of the village is minimal and new equipment is difficult to afford in a tax-capped budget. The Village of Cooperstown owns both of these pieces of equipment and is willing to enter into an agreement with the Village of Milford to use these items as needed. Crack sealing, street sweeping and culvert cleaning only need to be done at certain times of the year to maintain roadways to satisfactory conditions and when Cooperstown completes their maintenance, Milford will be able to use the equipment. Taxpayer savings will add up quickly with a project of this nature. Not having to purchase equipment is important, but roadway maintenance prevents further infrastructure damage in the future.

Needs Assessment:

Memorandum of Agreement; logistics

Estimated Savings:

2019	2020
\$333,500	TBD

Notes:

Equipment rates calculated using NYS DOT Equipment Rental Rate Schedule (2017)



### Shared Service Worksheets

**Project 6: Otsego County Stream Management Program**  
Category: Construction; Public Works Estimated Start Date: 2019

Participating Municipalities:

County: Otsego County, Otsego County Soil and Water Conservation District;  
Towns: Exeter, Burlington, New Lisbon, Pittsfield, Morris, Butternuts, Unadilla

Project Description:

The Otsego County Stream Management Program will be a partnership between the Otsego County Soil and Water Conservation District (SWCD) and municipalities in Otsego County. Otsego County and the SWCD will have an Interagency Agreement in place for SWCD to serve as the contractor for the Stream Management Program. Individual municipalities will contract with SWCD to complete a number of stream management projects including but not limited to: proper ditching; securing stream banks; and correctly sizing and replacing culverts.

This initiative is a proactive approach to safety and mitigation measures for the municipalities. Equipment, operators, and management of the fleet delivery will be the responsibility of the Otsego County Highway Department. Further, Engineering and permitting responsibilities may be handled by SWCD providing savings of taxpayer dollars to the local municipalities that have limited financial resources, and lack the equipment and operators needed to complete these projects.

Needs Assessment:

Interagency Agreement (County/SWCD); Memoranda of Agreement (SWCD/municipalities); engineered plans (when required); construction planning; municipal equipment assessment

Estimated Savings:

2019	2020
TBD	TBD

Notes:

Equipment rates calculated using NYS DOT Equipment Rental Rate Schedule (2017)



## 5 FUTURE SHARED SERVICE INITIATIVES

Otsego County has been, and will continue to be, committed to finding innovative ways to improve efficiency, eliminate redundancy, and save taxpayer dollars. The Panel has identified a number of initiatives that will continue for the 2019 Shared Services Plan that will provide real, verifiable tax dollar savings to the residents of Otsego County. These initiatives include a continuation of identified projects in the 2018 Plan as well as the addition of new initiatives.

Planned shared services projects such as the Highway Asset Management Program and Municipal Accounting Software Distribution anticipate accepting new municipalities in the 2019 Shared Services Plan that did not participate in the 2018 Plan. The Otsego County Stream Management Program has been well-accepted by municipalities and success in the 2019 calendar year will generate additional interest from municipalities in the future. New initiatives include: Otsego County Healthcare Consortium; Shared Regional Transit/Highway Facility; Four-town Combination (Decatur, Maryland, Westford, Worcester); and County-assisted Assessing.

This endeavor provides the most comprehensive and strategized taxpayer savings plan Otsego County has developed. Shared services has been well established in municipalities and the county years prior, however actual savings will be quantified and actual agreements will be in place. The projects and goals set forth in the Plan will be a success for providing taxpayer savings not only as required in the CWSSI, but also for the standards set by the Panel and the residents of Otsego County.

### Reference:

Bureau of Justice Statistics. 2018. State Justice Statistics Program. Last accessed 30 July 2018. <https://www.bjs.gov/index.cfm?ty=tp&tid=48>

New York State Department of Transportation Operations & Asset Management Division—Office of Transportation Maintenance. 2017. Equipment Rental Rate Schedule.

New York State Shared Services Initiative. 2018. Last accessed 30 July 2018. <https://www.ny.gov/programs/shared-services-initiative>

United States Census Bureau. 2017. Quick Facts—Otsego County, NY. Last accessed 30 July 2018. <https://www.census.gov/quickfacts/fact/table/otsegocountynyork/PST045217>