



**County-wide Shared Services  
Initiative  
Guidance Document**

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## Program Overview

The FY 2018 State Budget includes a new initiative designed to generate property tax savings by facilitating operational collaboration between local governments. The County-wide Shared Services Initiative (the "Initiative") establishes a Shared Services Panel (the "Panel") in each county, chaired by the Chief Executive Officer of the County. The Panels will work to help develop, and ultimately approve a County-wide Shared Service Property Tax Savings Plan (the "Plan"), through intergovernmental cooperation to find new opportunities to share and coordinate services.

Plans that create actual and demonstrable property tax savings may be eligible for a one-time match of the net savings resulting from new actions implemented pursuant to the Plan.

## Participants

The Panel Chair and Panel Members are required to participate in the development of the County-wide Shared Services Property Tax Savings Plan, as described in the table below. Panel meetings should comply with the New York State Open Meetings Law.

Panel Participants	Composition	Duties
Panel Chair (the Chief Executive Officer (CEO) of the County)	The county executive, county manager, county administrator or other chief executive of the county, or, where none, the chair of the county legislative body.	Responsible for the proper creation, development and submission of the County-wide Shared Services Property Tax Savings Plan. The CEO is permitted to identify and invite the participation of Optional Panel Members (see below).
Required Panel Members	Mayors of every city and village, and supervisors of every town, within the county.	Participate in development of the Plan. Vote on the Plan.
Optional Panel Members	One representative from the governing body of any school district, board of cooperative educational services (BOCES), and/or special improvement district in the county, upon receipt and acceptance of an invitation to participate on the Panel from the Panel Chair (CEO).	Participate in development of the Plan. Vote on the Plan.

The goal of the county-wide planning process is to save property taxpayers money, by identifying collaborative opportunities for shared services between as many local governments as possible.

## Plan Development and Submission

The following Plan development timeline outlines responsibilities and important dates. It is intended to help facilitate the creation of the County-wide Shared Services Plan.

<b>Plan Development Timeline</b>	
<b>Starting Immediately</b>	
Action	Explanation
<b><u>Creation of the Panel</u></b>	
<input type="checkbox"/> <b><u>CEO shall</u></b> convene a Shared Services Panel within the county.	The CEO shall serve as chair of the Panel. In addition to the CEO, the Panel must consist of the mayor of every city or village within the county, and the supervisor of every town within the county.
<input type="checkbox"/> <b><u>CEO may</u></b> invite to participate on the Panel: School Districts, BOCES, and/or Special Improvement Districts.	Upon invitation by the CEO, the governing body of the invited entity may accept the invitation by selecting, by a majority vote, a representative of the governing body to serve on the Panel.
<b>No Later Than August 1, 2017</b>	
<b><u>Development of the Initial Plan</u></b>	
<input type="checkbox"/> <b><u>CEO shall</u></b> consult with, and take recommendations from Panel representatives.	The CEO shall regularly consult with, and take recommendations from all the representatives of the shared services Panel as well as the representative of each collective bargaining unit of the county and the cities, towns, and villages and other optional invited panel members.

**Submission to the County Legislative Body**



**CEO shall** submit the plan to the county legislative body. The plan must be accompanied by a certification as to the accuracy of the property tax savings.

CEO shall submit the plan to the county legislative body. The plan must be accompanied by a certification as to the accuracy of the property tax savings. The following certification may be used: *“By my signature below, I hereby certify that the savings identified and contained herein are true and accurate to the best of my knowledge and belief”*. Thereafter, the county legislative body shall review the Plan, and may, by a majority of its members, issue an advisory report with recommendations to the CEO.

**No Later Than September 15, 2017**



**The CEO may** modify the Plan in response to any advisory report issued by the county legislative body.

Upon receipt of an advisory report from the county legislative body, the CEO may modify the Plan.

If modified, the CEO shall produce an updated certification as to the accuracy of the property tax savings.



**CEO shall** arrange three or more public hearings to occur within the county.

The CEO, the county legislative body, and the Panel shall accept input and testimony on the Plan from the: public, civic, business, labor, and community leaders. To facilitate such input, a minimum of three public hearings shall be held within the county. All such public hearings shall be conducted prior to the submission of the county-wide shared services property tax savings plan to a vote of the shared services Panel. Public notice of all such hearings shall be provided at least one week prior in the manner prescribed in subdivision 1 of section 104 of the Public Officers Law. This process should begin as early as possible, as at least three public hearings must be conducted prior to the Panel vote.



**Panel shall** vote on the Plan submitted by CEO.

A majority vote of the Panel is required for approval of the Plan. Each Panel Member must state in writing the reason for his or her vote. However, prior to the vote each member of the Panel may remove any proposed action that affects their local government. Written notice of the removal will be provided to the CEO prior to the Panel-wide vote.

**If the Plan is Approved:**



**The CEO shall** finalize the Plan.



**The CEO shall** submit to the Director of the Division of the Budget a certification of the Plan and its property tax savings plan.

<input type="checkbox"/>	<b>The CEO shall</b> disseminate the Plan to residents of the county in a concise, clear, and coherent manner using words with common and everyday meanings.
<b><u>If the Plan Fails or is not Voted on:</u></b>	
<input type="checkbox"/>	<b>The CEO shall</b> release, to the public, a report on the proposal, including the vote of the Panel, the vote of each Panel Member and the reasons for their vote.
<input type="checkbox"/>	<b>The CEO shall</b> then follow the same procedures defined in this section to attempt to produce an approved county-wide shared services property tax savings plan by the deadlines required for 2018 (which are the same dates as in 2017).
<b>No Later Than October 15, 2017</b>	
<input type="checkbox"/>	<b>The CEO shall</b> conduct a public presentation of the Plan, if it was approved. Public notice of such public presentation shall be provided at least one week prior in the manner prescribed in subdivision 1 of section 104 of the Public Officers Law.

## Plan Contents

County-wide Shared Service Property Tax Savings Plans should include, but are not limited to, shared and coordinated actions that can be implemented during the subsequent calendar year.

The proposals in the Plan must be among: the county, cities, towns and villages within the county, as well as any participating school districts, BOCES or special improvement districts.

The Plan must contain new recurring property tax savings to be achieved through actions such as, but not limited to, the elimination of duplicative services, shared services, the reduction of back-office administrative overhead, and the improved coordination of services.

If the Plan contains a proposed action that by law is otherwise subject to a procedural requirement such as a public referendum, then the planned action will not be operative until said procedural requirement occurs.

The Plan must begin with the summary document (APPENDIX A) when it is publicly disseminated and when it is submitted to the Director of the New York State Division of the Budget (DOB). There is no prescribed format for the individual proposals contained within the plan, but they must be in a concise, clear, and coherent manner using words

with common and everyday meaning. A certification of the Plan and the property tax savings set forth therein is required when the final Plan is transmitted by the CEO to DOB (APPENDIX A, Certification). The Panel Chair may obtain individual certifications from any local governments within which savings will be attributed from such local government.

## **State Support**

The Department of State will provide technical assistance to local governments engaged in this Initiative. Please check regularly at [www.dos.ny.gov](http://www.dos.ny.gov) for updates and assistance opportunities. In addition, the Department of State has established an email address ([countywidesharedservices@dos.ny.gov](mailto:countywidesharedservices@dos.ny.gov)) through which questions and requests may be submitted.

Plans finalized in 2017 may be eligible for a one-time match of the net savings from new shared service actions implemented and achieved among multiple jurisdictions between January 1<sup>st</sup> and December 31<sup>st</sup> of 2018. Plans finalized in 2018 may be eligible for a one-time match of such savings achieved between January 1<sup>st</sup> and December 31<sup>st</sup> of 2019. In addition, participation in other grant programs supporting local government consolidation does not disqualify entities for the match under this initiative.

The Department of State will develop an application for such funding in conjunction with the Division of the Budget.



# County-Wide Shared Services Property Tax Savings Plan

## APPENDIX A

### County-wide Shared Services Property Tax Savings Plan Summary

<b>County of</b>			
<b>County Contact:</b>			
<b>Contact Telephone:</b>			
<b>Contact Email:</b>			
<b>Partners</b>			
<b>Row 1 – (total # of) Cities in County</b>			
	<b>Participating Cities</b>	<b>Panel Representative</b>	<b>Vote Cast (Yes or No)*</b>
1.			
2.			
3.			
4.			
5.			
6.			
<small>Use additional sheets, if necessary.            *The written justification provided by each Panel Representative in support of his or her vote on the Plan is attached hereto, as Exhibit 1.</small>			
<b>Row 2 – (total # of) Towns in County</b>			
	<b>Participating Towns</b>	<b>Panel Representative</b>	<b>Vote Cast (Yes or No)*</b>
1.			
2.			
3.			
4.			
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6.			
7.			
8.			
9.			





# County-Wide Shared Services Property Tax Savings Plan

## APPENDIX A

10.			
11.			
12.			
13.			
14.			
15.			
16.			
17.			
18.			
19.			
20.			

Use additional sheets, if necessary.

\*The written justification provided by each Panel Representative in support of his or her vote on the Plan is attached hereto, as Exhibit 1.

Row 3 – (total # of) Villages in County			
	Participating Villages	Panel Representative	Vote Cast (Yes or No)*
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

Use additional sheets, if necessary.

\*The written justification provided by each Panel Representative in support of his or her vote on the Plan is attached hereto, as Exhibit 1.



# County-Wide Shared Services Property Tax Savings Plan

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Row 4 – (total # of) School Districts, BOCES, and Special Improvement Districts in			County
	Participating School Districts, BOCES, and Special Improvement Districts	Panel Representative	Vote Cast (Yes or No)*
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			
16.			
17.			
18.			
19.			
20.			
Use additional sheets, if necessary. *The written justification provided by each Panel Representative in support of his or her vote on the Plan is attached hereto, as Exhibit 1.			
Row 5			
	2017 Local Government Property Taxes	The sum total of property taxes levied in the year 2017 by the county, cities, towns, villages, school districts, BOCES, and special improvement districts within such county.	



## County-Wide Shared Services Property Tax Savings Plan

### APPENDIX A

<b>Row 6</b>	
<b>2017 Participating Entities Property Taxes</b>	The sum total of property taxes levied in the year 2017 by the county, any cities, towns, villages, school districts, BOCES, and special improvements districts identified as participating in the panel in the rows above.
<b>Row 7</b>	
<b>Total Anticipated Savings</b>	The sum total of net savings in such plan certified as being anticipated in calendar year 2018, calendar year 2019, and annually thereafter.
<b>Row 8</b>	
<b>Anticipated Savings as a Percentage of Participating Entities Property Taxes</b>	The sum total of net savings in such plan certified as being anticipated in calendar year 2018 as a percentage of the sum total in Row 6, calendar year 2019 as a percentage of the sum total in Row 6, and annually thereafter as a percentage of the sum total in Row 6.
<b>Row 9</b>	
<b>Anticipated Savings to the Average Taxpayer</b>	The amount of the savings that the average taxpayer in the county will realize in calendar year 2018, calendar year 2019, and annually thereafter if the net savings certified in the plan are realized.
<b>Row 10</b>	
<b>Anticipated Costs/Savings to the Average Homeowner</b>	The percentage amount a homeowner can expect his or her property taxes to increase or decrease in calendar year 2018, calendar year 2019, and annually thereafter if the net savings certified in the plan are realized.
<b>Row 11</b>	
<b>Anticipated Costs/Savings to the Average Business</b>	The percentage amount a business can expect its property taxes to increase or decrease in calendar year 2018, calendar year 2019, and annually thereafter if the net savings certified in the plan are realized.



# County-Wide Shared Services Property Tax Savings Plan

## APPENDIX A

### CERTIFICATION OF PLAN AND PROPERTY TAX SAVINGS TO DIRECTOR OF BUDGET

By my signature below, I hereby certify that the County-Wide Shared Services Property Tax Savings Plan submitted herewith is final, that it was completed in accordance with the requirements of Part BBB of Chapter 59 of the Laws of 2017, and that the savings identified and contained herein are true and accurate to the best of my knowledge and belief.

\_\_\_\_\_ County Chief Executive Officer

(Print Name)

\_\_\_\_\_

(Signature)

(Date)