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Energy Action Consortia: Moving Municipalities Toward Collective Sustainability

Discussion Brief #10 – Fall 2013

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“When disasters hit, the government is the only agent with the authority and capacity to coordinate...across jurisdictions and with both public and private actors. And its mission is not to enhance its balance sheet but to preserve the well-being of its citizens.”
(Morris, 2012)



Herb Oringel is Chair of the Board of Directors of NWEAC and helped create and organize the innovative consortium. Herb is a 44-year veteran of IBM where prior to retiring, he participated as a Solutions Marketing executive. The Solutions business in IBM required collaborative work amongst the various brands (hardware, software and services) and geographic sales organizations (Americas, Europe and Far East), excellent background for building a consortium of disparate stakeholders.



Leo Wiegman is co-founder and president of Croton Energy Group Inc and serves as Mayor of the Village of Croton-on-Hudson, New York. He is co-author of two books, *The Climate Solutions Consensus* with David Blockstein, on climate science and sustainability policy, and *Heirlooms to Live In* with Mark Hutker on residential architecture. He is a regular contributor to *State and Local Energy Report*, and has also written commissioned articles for the *Solutions Journal* and the *Encyclopedia of Earth*. Previously, he was a book publisher and editor for nearly three decades. His BS is from Tufts University.

Edited by KT Tobin

“UNITED WE STAND, DIVIDED WE FALL.”
AESOP

This is a story of how our national economic crisis in 2008 produced local opportunity in the lower Hudson Valley’s Westchester County. Signed into law by President Barack Obama less than two months after he was sworn in, the \$831 billion American Recovery and Reinvestment Act (ARRA), or Recovery Act, represented a nearly unprecedented response to the massive national and international economic recession. Its primary goal was to create jobs, in part through targeted public investment in such areas as energy efficiency (US Department of Energy, 2009).

PART 1: THE NWEAC STORY

In 2009, a group of northern Westchester County municipalities teamed up to create a collaborative energy efficiency program, targeted for homeowners, to win some of the federal Recovery Act stimulus funding. The lessons

these municipalities learned along the way may be helpful for others seeking to work collaboratively to achieve objectives together that would be much harder to achieve alone.

From a founding membership of twelve municipalities in April 2009, the group grew into a legally established consortium by 2013 enrolling eighteen municipalities representing a combined population of over 274,000 residents. Formally named the Northern Westchester Energy Action Consortium, NWEAC incorporated as a non-profit in New York State in 2010 and achieved 501(c)(3) non-profit status in early 2013. Each member municipality assigns its chief elected official (mayor or supervisor), or another high level delegate, to represent it in consortium meetings and deliberations. Through its achievements since 2009, NWEAC is now recognized in Westchester

County and beyond as an innovative leader in energy policy and practice, as well as on sustainability issues more generally.

Meanwhile, in 2010 eleven municipalities in southern Westchester County created a sister consortium, the Southern Westchester Energy Action Consortium (SWEAC), comprised of the appointed chairs of municipal environmental committees. Located in a more populous section of the county, in 2013 SWEAC membership comprised ten municipalities representing a combined population of over 365,000 residents. The two sibling consortia collaborate frequently with each other on numerous programs, from promoting backyard leaf mulching to streamlining solar permitting. The total population of the twenty-nine collaborating municipalities is almost two-thirds of that of the entire county (See Map 1).

The consortia story shows how with strong leadership and consistent local commitment a collaborative intergovernmental infrastructure created for a particular purpose may develop into an important regional resource. These collaborations continue to develop as their initial incubation evolves and leads to additional opportunities.

What essential ingredients created NWEAC? The stimulus opportunity of 2009 certainly presented an unprecedented catalyst for collaboration, creating positive interactions among those community members already so inclined. By coalescing ongoing networks, expertise, and politi-

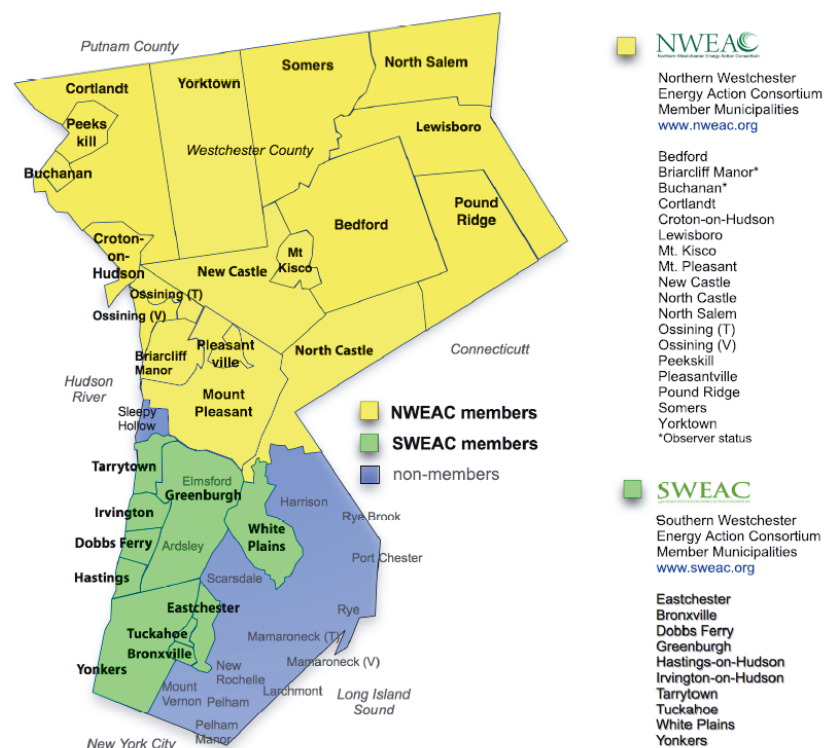
cal will among the neighboring communities around a big, time-sensitive goal, the prospect of considerable federal funding from the Recovery Act accelerated the initial formation of NWEAC. Yet, the seeds for doing so were already germinating.

In response to the availability of federal funding, the initial phone calls and emails among municipal officials and advisors in northern Westchester County centered largely on answering each other's questions about how to fill out an Energy Efficiency Community Block Grant Program (EECBG) application for individual municipalities. These calls across municipal borders

were accelerated with the help of an international organization created to encourage and support "local action for global sustainability," ICLEI-Local Governments for Sustainability. Shortly after the Recovery Act application guidelines were published, ICLEI organized conference calls for its member municipalities to discuss the Recovery Act opportunities, particularly in the EECBG program (ICLEI USA, 2013).

During one of the initial ICLEI calls, Herb Oringel, a volunteer advising the Town of Somers, asked whether any other northern Westchester County neighboring municipalities were on the line. It turned out that a high number of

Map 1: The Westchester Energy Action Consortia—NWEAC & SWEAC in 2013



Through its achievements since 2009, NWEAC is now recognized in Westchester County and beyond as an **innovative leader** in energy policy and practice, as well as on sustainability issues more generally.

these municipalities were ICLEI members. A few of – including Yorktown, Bedford, Croton, Mt. Kisco, New Castle – followed up, eager to meet in person to brainstorm about how to take advantage of this large and possibly unique funding opportunity.

Lesson 1: Start with Existing Relationships

As the group began to coalesce, the focus turned to fleshing out a major program for ramping up local completions of home energy upgrades to save home owners money, lower emissions, make homes more comfortable, and create good local jobs. In particular, the group focused on the DOE's Better Buildings Neighborhood program (US DOE EERE, 2013).

In researching the state's existing home energy efficiency program history, the grant team learned that the annual statewide participation rates after a decade of effort by the state had never been higher than one-tenth of one percent. In other words, in any given year no more than 1 out of every 1,000 New York State homeowners chose to complete a home energy upgrade using the proven building science methods promoted by the state.

The Town of Bedford's volunteer Energy Resource Director Mark Thielking had a vision to "make energy efficiency for buildings the new social norm just like wearing seat belts became the norm for driving a car a generation ago." In pursuit of this vision, the grant team proposed to dramatically increase the state's historical rate of completed home energy upgrades by 1500 percent through a proposed program that is now known as Energize New York. This required achieving participation by at least 15 homes out of every 1,000 in northern Westchester County over the course of three years. As these municipalities contained about 100,000 housing units, the resulting energy upgrade completion target was just under 1,500 homes.

In the language of the Better Building program, the Energize team proposed to add "community-based social marketing" to the state's existing components of building science, certified contractors, and subsidized financing terms. This marketing would be targeted in each community through identification, development and hands on support for "local trusted sources," that is, existing, well-established groups and networks. The team chose this approach of integrating com-

munity-based social marketing into energy efficiency outreach for a few reasons, including the existing research from the National Renewable Energy Laboratory that showed that this combination worked well for reaching building owners.

Lesson 2: Think Big!

The initial Recovery Act EECBG terms restricted applicants to individual municipalities. Further, municipalities with populations of 35,000 or greater would receive an automatic, pro-rated block grant. But municipalities with fewer than 35,000 in population had to compete with each other for funding. Only one municipality in northern Westchester County, the Town of Yorktown, had a large enough individual population to qualify for an automatic block grant allocation.

In the summer of 2009, the nascent Northern Westchester Energy Action Coalition team participated in feedback sessions with the U.S. Department of Energy (DOE)'s Energy Efficiency Conservation Block Grant (EECBG) program officers. The team requested that a group of allied municipalities be allowed to apply directly and jointly in the next round of funding. Two

The consortia story shows how, with strong leadership and consistent local commitment, a collaborative intergovernmental infrastructure created for a particular purpose may develop into an **important regional resource.**

months later, the DOE issued a small but meaningful modification in the eligibility rules that specifically made “consortia” of local government eligible.

Meanwhile, an ongoing dialogue between the local grant writing team and residential energy efficiency program managers at the New York State Energy Research Development Authority (NYSERDA) led to a good working relationship between these potential state and local partners. NYSERDA piggybacked northern Westchester’s program onto its own 2005 State Energy Plan submission to DOE. Via active collaboration with state officials, the project essentially got two bites at the DOE apple, one under its own application and a second as an appendix to New York State’s application.

This active intergovernmental dialogue continues right up through the present. NWEAC and SWEAC leaders have cultivated ongoing working relationships with state and federal elected officials to tap into opportunities that might arise in Albany and Washington. In short, it pays to tell everyone above, beside, and below you what you are trying to accomplish.

Lesson #3: Engage with All Levels of Government

By the spring of 2010, the leaders of the Recovery Act grant-writing efforts felt that becoming a more formal organization would help strengthen the group’s hand in working with other levels of government and with non-profit and private sector organizations with similar interests. Other knowledgeable groups, such as the Westchester Community Foundation, were supportive of this approach.

As the DOE now recognized consortia, the leadership team asked the coalition’s municipalities to sign an inter-municipal agreement elevating the municipal cooperation from “coalition” to “consortium.” The agreement also included a requirement for the signatory municipalities to pay modest annual membership dues (\$1,000) in exchange for a voice in choosing a board of directors, and votes on policy and program matters. On April 4, 2010, twelve municipalities signed the “Declaration of Interdependence” inter-municipal agreement (IMA) that formally called into creation the Northern Westchester Energy Action Consortium (NWEAC) to act collectively on behalf of its municipal members.

But the key relationships that underlay the creation of both NWEAC and later SWEAC were present before the Recovery Act opportunity arrived. It’s highly likely that the consortia would have coalesced eventually even without the prospect of stimulus money as a catalyst. First, the economies of scale for pooling both the buying power and intellectual resources across the municipal borders are just too beneficial to ignore. In tackling energy-related opportunities, both NWEAC and SWEAC have been able to integrate a broad array of specific expertise and techniques for all members that no individual member possessed within its own borders.

Second, the municipalities in northern Westchester County were already working jointly on myriad projects, as is common throughout New York State: protecting watersheds, treating sanitary sewage, offering fire and ambulance services, supplying potable water, collaborating on recreation programs, and more. The chief elected officials and key staff of municipalities across Westchester County know each other well from participating in such county-wide organizations as the Westchester Municipal Officials Association.

Third, the “green revolution” already had a very strong presence among these communities. Under the leadership of a nonprofit devoted to promoting sustainability, Bedford 2020, Bedford volunteers had held a very successful Environmental Summit in January 2009. The Village of Croton-on-Hudson was the first municipality in New York State to purchase wind power for its own electricity needs. Many of these municipalities were members of New York State’s Greenway Program. The area’s river-front municipalities

were already collaborators in Historic Hudson River Towns, a nonprofit promoting the region. Many municipalities had passed the Climate Smart Community Pledge, “to reduce greenhouse gas emissions, save taxpayer dollars and advance community goals for health and safety, economic vitality, energy independence and quality of life” (NYS DEC, 2013). Several already had some form of appointed volunteer committee focused on sustainability, such as an Energy Advisory Panel (EAP) or Conservation Advisory Council (CAC).

Eleven of the municipalities were members of ICLEI-Local Governments for Sustainability.

Lesson #4: Build on Pre-existing Local Actions and Values

The business case for the entire residential energy efficiency program was designed to become fiscally self-sufficient within a few short years of being launched. The goal was, and remains, to wean the program off of the need for federal or state grant dollars as rapidly as possible.

Table 1. NWEAC Member Demography (2013)

Municipality	Population (2010)	Land Area (Square Miles)	Population Density (Persons/Square Mile)	Median Household Income	Total Housing Units	Total Households	Majority Political Party	NWEAC Member Since
Town of Bedford	17,335	37.20	466	\$148,637	6,326	5,987	R	2009
Village of Briarcliff Manor	7,867	5.90	1,333	\$181,806	2,753	2,516	N	2010*
Village of Buchanan	2,230	1.40	1,593	\$84,464	863	826	D	2009*
Town of Cortlandt	31,292	34.73	901	\$71,521	11,976	9,741	D	2009
Village of Croton-on-Hudson	8,070	4.76	1,695	\$96,579	3,123	2,910	D	2009
Town of Lewisboro	12,411	27.90	445	\$167,616	4,854	4,191	D	2009
Town of Mt. Pleasant	26,931	27.70	972	\$122,973	8,554	7,663	R	2013
Village of Mt. Kisco	10,877	3.10	3,509	\$62,321	4,289	3,996	D	2009
Town of New Castle	17,569	23.20	757	\$192,503	6,037	5,729	D	2009
Town of North Castle	11,841	24.10	491	\$139,508	4,135	3,544	R	2009
Town of North Salem	5,104	21.40	239	\$103,177	2,082	1,613	R	2009
Town of Ossining	5,406	8.50	636	\$110,788	1,992	1,998	D	2010
Village of Ossining	25,060	3.20	7,831	\$70,139	8,862	8,465	D	2009
City of Peekskill	23,583	4.38	5,384	\$59,123	9,709	9,051	D	2009
Village of Pleasantville	7,019	1.80	3,899	\$100,385	2,680	2,844	N	2012
Town of Pound Ridge	5,104	22.80	224	\$193,624	2,108	1,701	R	2009
Town of Somers	20,434	32.13	636	\$103,691	7,982	7,197	R	2009
Town of Yorktown	36,081	36.70	983	\$105,386	13,418	13,128	R	2010
Total	274,214	320.90	855	--	101,743	93,100	--	--

* indicates municipality participates with NWEAC observer status as non-dues-paying and non-voting participant. Populations for towns exclude the population for any village inside that town. Sources: U.S. Census 2010, 2013; Westchester Municipal Planning Federation, 2013.

The Town of Bedford's volunteer Energy Resource Director Mark Thielking **had a vision** to “make energy efficiency for buildings the new social norm just like wearing seat belts became the norm for driving a car a generation ago.”

The funding would come from market-based incentives for the use of private capital to fund deep energy retrofits. Ideally, individual upgrades create more in savings than the cost of financing the work that produced the savings.

Lesson #5: Have a Sound Financial Plan and Business Case

The awarding in the spring of 2010 of three grants totaling \$2.64 million over three years allowed the Energize program to staff up immediately while building out its own infrastructure. The \$2.64 million awarded the Town of Bedford for Energize New York on behalf of the NWEAC member municipalities included \$1.26 million from the DOE (via EECBG) and \$1.26 million from NYSERDA (via State Energy Program) and \$120,000 from NYSERDA for Energy Management Personnel (via RFP 10). Had the seed funding been smaller, those activities could and mostly likely would have developed, though more slowly for all the reasons noted above.

But, even though sustainability initiatives were underway in many of these communities, given their dissimilarities the dozen municipalities that pledged mutual interdependence in April

2010 forming NWEAC were not obvious partners. The northern tier of the county is highly socioeconomically and politically diverse. In 2010, two populous Hudson River communities, the Village of Ossining and City of Peekskill, had densities that exceed 5,000 residents per square mile. Meanwhile the more rural, wealthier towns to the east had densities of less than 500 persons per square mile, with much of their abundant open space lying within the New York City water supply watershed protection areas. Hudson River municipalities had median annual household incomes of less than six figures while median incomes in those to their east in some cases approached \$200,000 per year.

With regard to municipal type, the towns are wealthier and far less densely populated than the villages or cities. Only one town had median household income below \$100,000. All the towns have population densities below 1,500 persons per square mile and all the villages and cities have population densities above that level. Only one village had a median household income significantly above \$100,000 per annum. The more populous locales with lower median household income often had larger municipal staffs, which could, for example, provide a treasurer of the fledg-

ling consortium or lend an urban planner to the group. The smaller communities, as it happened, often had highly motivated citizen volunteers available with specific, relevant expertise and time to lend to the entire effort. The neighboring municipalities realized the benefits of relying on one another; the whole was more than the sum of the parts. As a result, the smaller places were just as valued for their contributions as the more populous communities and vice versa.

The elected officials that represent NWEAC municipalities are also quite diverse in their political affiliations, including leaders from both major parties and some chosen in non-partisan elections. As of early 2013, among the NWEAC municipalities, the chief elected officers are almost evenly divided between the two major parties with nine Democrats, seven Republicans, and two non-affiliated mayors or supervisors. Hudson River communities tend to be led by Democrats, while the eastern towns are often led by Republicans. Yet partisan discussions never entered the collaboration. In fact, NWEAC member municipalities with a change in mayor or supervisor or board majority have remained members following any such elections turnovers.

. . .the economies of scale for pooling both the buying power and intellectual resources across the municipal borders are just **too beneficial to ignore.**

Lesson #6: Let Diversity Build Strength

Many of the mayors, supervisors, managers, and administrators were experienced at grant writing. But, in the case of the Recovery Act opportunity, no single municipality had all of the requisite expertise on energy efficiency for the residential sector needed to prepare a high-quality, competitive application. Each municipality interested in joining the grant proposal was asked to name at least one community member or staff person with relevant interest to be part of the grant preparation team. The resulting roster included experts in finance, energy, marketing, municipal operation, and the building trades, representing a broad cross-section of the skills and knowledge that designing this particular program required.

As the grant preparation got underway, by summer 2009, more and more community members came forward to offer detailed, professional feedback on the drafts as well as suggestions for designing the work scope and improving the overall program proposal. Openness to new input – indeed, actively seeking it – led to a natural tension between chaos and creativity on the one hand versus the need to

meet concrete deadlines on the other. The grant team successfully avoided both the hubris of “know-it-all-ism” and the pitfall of “groupthink” by simply admitting no one person had all the answers or capacities to meet this new challenge.

Lesson #7: Prize All Contributions Equally

In the end, the team developed a residential energy efficiency program pilot that was specifically designed to work for both higher income, semi-rural areas as well as for older, less wealthy urban core communities. It achieved this breadth of applicability across diverse settings by focusing on how to use the social networks indigenous to each setting. This approach made the emerging program more flexible and potentially replicable across New York State.

Once the consortium took the official step of requiring membership dues in 2010, Peekskill stepped forward to act as the fiscal agent, lending the services of its treasurer to the group. Dues were set at a modest \$1,000 per year per municipality. These funds allowed the fledgling consortium to pursue incorporation and 501(c)(3) status, and to secure other needed professional

services. The Town of Bedford had an unpaid staff position of Energy Resource Director, a relatively unique capacity, filled by Mark Thielking, who helped lead the initial grant writing process for the consortium and, later, once the grant had been awarded, lead the staff recruitment process for the funded positions in the Energize program.

Initially, some municipalities were not quite ready to make the step of joining as dues-paying, voting members. The consortium offered these communities “observer status” so that they could send delegates to the board meetings, ask questions, and contribute in whatever ways they felt comfortable. As the consortium grew, new potential members often started with this observer status, attending meetings and events. The effort to be inclusive has paid handsome dividends. As noted, the number of municipal members or observers climbed, as of May 2013, to eighteen municipalities representing a combined population of 274,214.

Lesson # 8: Take Baby Steps First

“Crawl, walk, run” works. Early in the EECBG grant preparation process, municipalities were asked by the grant team to sign

letters of support for the grant application. Municipalities were also asked to consider committing to a performance target of achieving a specific number of homes upgraded by the third year of the grant program. By offering both an easy “baby” step (a letter of support for the goals of the application) and a slightly more involved “ask” (support letter with a commitment to a retrofit performance target), the team gave municipalities more than one option for easing into the new collaboration. These initial commitments of support made it much easier for the team to ask those same municipal leaders to “take the next step” a few months later: signing an inter-municipal agreement to formally establish the new organization as a consortium.

Twelve municipalities were co-applicants on the Recovery Act EECBG grant application, with the Town of Bedford as the lead applicant. Each municipality’s elected board committed to participate by passing a resolution in support stating, “(Municipality) will promote the best practices and models developed in the BEEP (Bedford Energy Efficiency Pilot) Pilot in the town/village’s retrofit programs and will strive to incorporate best practices and models, including those derived from the BEEP.”

Eleven of the twelve also committed via resolution to specific target numbers of home upgrades completed by the end of the grant period, a total of 1489 homes in thirty-six months, to wit, “(Municipality) plans to become a member of the

NWEAC Energy Efficiency Retrofit Financing Corporation, a not-for-profit local development corporation that aggregates qualified energy conservation bond (QECB) financing, and will endeavor to have our residents retrofit (Target Number) homes within the three-year grant period using best practices, including those derived from the BEEP Pilot.”

It’s important to note that the original targets assumed the availability of PACE (Property Assessed Clean Energy) residential financing, which by the grant award date had been dealt a national setback through FHFA (Federal Housing Finance Agency) advisories. As a result, all awardees subsequently adjusted their targets in this new more restrained context.

Table 2. NWEAC Checklist in April 2010

	EECBG Fall 2009 Grant Support Letter	Targeted Goal for Number of Home Upgrades	ICLEI Member	Climate Smart Pledge	Citizen Advisory Committee	NWEAC IMA April 2010 Signatory	RFP10 Energy Management Participant	Press Releases or Newsletter Capacity
Town of Bedford	✓	✓	✓	✓	✓	✓	✓	✓
Town of Cortlandt	✓	–	✓	✓	✓	✓	✓	–
Village of Croton-on-Hudson	✓	✓	✓	✓	✓	✓	✓	✓
Town of Lewisboro	✓	✓	–	–	✓	✓	–	–
Village of Mt. Kisco	✓	✓	✓	✓	✓	✓	–	–
Town of New Castle	✓	✓	✓	✓	✓	✓	–	✓
Town of North Castle	✓	✓	–	✓	✓	✓	–	–
Town of North Salem	✓	✓	✓	✓	✓	✓	✓	–
City of Peekskill	✓	✓	–	✓	–	✓	✓	✓
Town of Ossining	–	–	✓	–	✓	–	–	–
Village of Ossining	–	–	✓	–	–	✓	–	–
Town of Pound Ridge	✓	✓	✓	✓	✓	✓	✓	✓
Town of Somers	✓	✓	✓	✓	✓	✓	✓	✓
Town of Yorktown	✓	✓	✓	✓	✓	–	–	–

The neighboring municipalities realized the **benefits of relying on one another**; the whole was more than the sum of the parts. As a result, the smaller places were just as valued for their contributions as the more populous communities and vice versa.

These early steps fostered very specific discussions within and among the elected boards of the involved municipalities about the large opportunities for energy and cost savings for residents. The specific targets for how many homeowners would complete energy upgrades (a.k.a. retrofits) within three years under the Energize program set the tone for development of the consortium mission statement in the fall of 2010.

The formal establishment of the consortium took place with the fanfare of signing the Intermunicipal Agreement on April 4, 2010, “Energy Interdependence Day.” Held in the Town of Bedford town hall, the event was deliberately planned as a celebration with some light refreshments and photo opportunities. The group’s chair, Herb Oringel, called each chief elected official up in roll call fashion to the table to sign the document. Press advisories issued in advance brought out the local media. Interviews and stories ran in print and web media immediately following the event. Bedford Supervisor Lee Roberts said, “We’re very concerned about our environment. We all have the same goals and the same desires to protect our community’s

health, welfare, and its beautiful environment.”

Lesson # 9: Celebrate Victories and Share the Credit!

The mood that day was especially jubilant. The Town of Bedford had just received notice of the award of the \$2.64 million award for the Energize program and the group knew it would now have the opportunity to deliver on grant promises: to create a pilot outreach program that would significantly increase the number of homeowners who undertake energy upgrades. In February 2010, seven consortium members led by the Village of Croton-on-Hudson applied to the NYSEERDA for funding totaling \$297,800 to conduct greenhouse gas inventories and/or climate action plans under the state’s Small Communities program. The participants included half of the NWEAC municipalities: Bedford, Cortlandt, Croton, North Salem, Peekskill, Pound Ridge, and Somers. Just as the Interdependence Day preparations got underway, the applicants learned it had been awarded. In short, the more project applications the consortium members undertook, the easier each subsequent effort seemed to become.

Lesson #10: Success Begets Success

Another municipality, the Town of Ossining, signed the NWEAC IMA a short while later, allowing thirteen founding communities who joined the union to seek the benefits of interdependence before the end of 2010 – reminiscent of the thirteen original American states. As spring passed to summer and autumn, the group held fewer formal gatherings, and more barbecues, picnics, and coffees to mix pleasure with business. These events nurtured ongoing personal relationships among the participants and provided impromptu face-to-face brainstorming opportunities.

October 2010 Mission Statement: The Northern Westchester Energy Action Consortium “(NWEAC) consists of sixteen municipalities in Westchester County, New York. Consortium members collaborate to reduce our reliance on fossil fuels, save money for our residents and businesses, increase energy efficiency in our communities, enable renewable energy generation, increase economic activity, and align our local efforts with county, state, and federal initiatives.”

Over the next eighteen months,

2009

Bedford 2020 Environmental Summit (January)

Recovery Act (ARRA) Stimulus Fund Kick-off (April)

Coalition formed, twelve municipalities with a combined population of over 188,000 sign support letters joining together under the Town of Bedford as lead applicant in the Energize application for Recovery Act EECBG funding (Fall)

EECBG Better Buildings Recovery Act grant application submitted (December)

2010

NYSERDA awards \$100,000 to Town of Bedford for energy management personnel to help staff the Energize Program (March)

NYSERDA awards \$297,800 to Village of Croton-on-Hudson on behalf of seven NWEAC member municipalities to conduct greenhouse gas inventories and construct Climate Action Plans (March)

"Declaration of Energy Interdependence Day," consortium is officially formed with signing of the NWEAC IMA by twelve founding municipalities (April)

DOE/NYSERDA awards \$2.6 million under Recovery Act EECBG for Energize New York (April-June)

SWEAC launches with six municipalities with a combined population of over 99,000 (June)

1st Annual NWEAC Strategy Conference (October)

Energize New York Program launches, beginning the year one pilot phase in the Town of Bedford (November)

NWEAC registers with New York State as a not-for-profit corporation (December)

NWEAC membership grows to sixteen municipalities with a combined population of over 240,000 (December)

2011

Seven NWEAC municipalities begin greenhouse gas inventories and Climate Action Plans under NYSERDA grant funding (January)

NWEAC receives the US EPA Environmental Quality Award (April)

Energy Improvement Corporation established as New York non-profit by Town of Bedford (July)

Energize New York roll out continues in year two expansion to other NWEAC municipalities (November)

SWEAC membership grows to ten municipalities with a combined population of over 364,000 (December)

NWEAC membership stable at sixteen municipalities with a combined population of over 240,000 (December)

2012

SWEAC hosts a Sustainability Forum at Sarah Lawrence College (January)

NWEAC sponsors Regional Sustainability Conference in Ossining (March)

Seven NWEAC municipalities publish greenhouse gas inventories and Climate Action Plans under NYSERDA grant funding (April)

NWEAC & SWEAC participate in the Pace Law School Land Use Learning Alliance Classes (April-June)

NWEAC & SWEAC participate in the Mid-Hudson Region Sustainability Plan process (May-December)

NWEAC establishes Municipal Solar Buyers Group partnership (August)

Energize New York roll out continues in year three expansion to all other NWEAC municipalities (November)

NWEAC membership grows to eighteen municipalities with a combined population of over 247,000 (December)

2013

Municipal Solar Buyers Group expands to Schools/Residential Housing

Petition submitted to NYS Public Service Commission to enable NYPA customers to participate in state incentive programs for solar installation (March)

NWEAC obtains 501(c)(3) designation from IRS (April)

Energy Improvement Corporation (EIS) membership expands to nine local governments with a combined population of over 520,000 (May)

SWEAC & NWEAC cosponsor a Solar Permitting Workshop with assistance from ICLEI-Local Governments for Sustainability and IREC at Pace Law School (May)

NWEAC membership stable at eighteen municipalities with a combined population of over 274,000 (June)

SWEAC & NWEAC constitute an alliance of local governments with a total combined population of over 639,000 in twenty-nine municipalities (June)

“We’re crossing municipal boundaries and saying that common solutions can be found if people work together. And Albany, the federal government, and the county government really take notice when they see municipalities banding together around common concerns because they become **real concerns of people** and not political agendas.” Mayor Mary Foster



after choosing a technical consultant team through a request-for-proposal process, seven municipalities led by Croton-on-Hudson developed an impressive climate action plan. Distinct patterns emerged in municipalities with similar mixes of services. The cities and villages had more street lighting and therefore significant opportunities for lowering energy costs came with lighting upgrades. For the less densely populated towns, fuel expense for municipal transportation represented a larger portion of the total overall energy expense. For all, liquid fossil fuel use (fuel oil) for buildings and transportation was the largest source of GHG emissions.

The adoption of the IMA en-

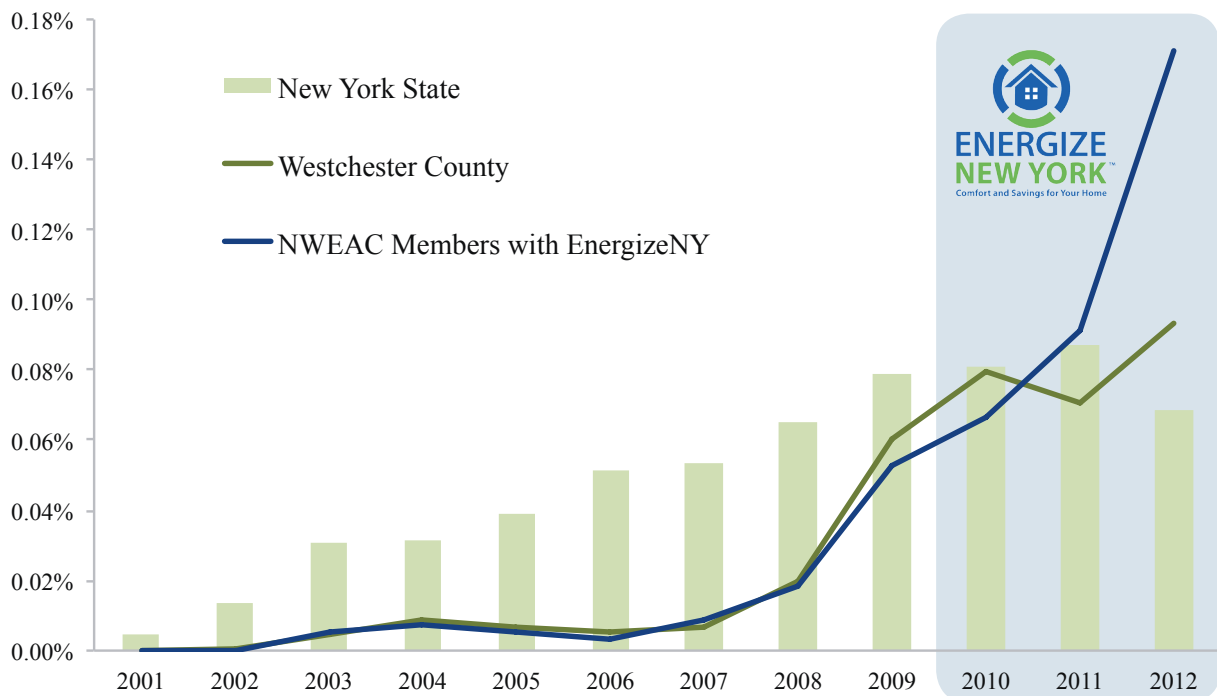
abled NWEAC to receive direct grant funding from the Westchester Community Foundation. With a small timely grant from the foundation, the consortium was able to host a professionally facilitated strategy retreat in October 2010, and hire a professional videographer to produce a short informational video for the general public about the consortium’s activities and goals. By the end of the day, retreat participants had constructed the key components of a mission statement. Westchester Community Foundation staffers were also active in local sustainability efforts and in advising the consortium’s leadership team. The foundation was also very helpful to the fledgling consortium in guiding the group toward pro

bono legal assistance to help with incorporation and applying for non-profit tax status.

In the span of twelve months between the fall of 2009 and fall of 2010, the municipalities in northern Westchester County had thus gone from being a loose coalition of communities with parallel interests to a formal organization with by-laws, dues, and a leadership structure with major grant-funding to build the Energize New York program. The fledgling consortium had at least four grant-based contractual deliverables centered on community-based awareness and implementation of both residential energy efficiency and climate actions to reduce carbon dioxide emissions: three Energize Program funds comprising \$2.64 million and the Climate Action Planning grant for \$297,800, for a total of \$2.938 million. In addition, in 2012, the Town of Bedford was awarded a Better Buildings sub-grant totaling \$83,280 for the Energize Starter Town Toolkit to carry the program message to the other 180 municipalities in the Mid-Hudson Region.

The Energize New York program was launched in 2010 in the

Figure 1: Percent of Housing Units with Completed Home Performance Energy Star Upgrades 2001-2012 for New York State, Westchester County, and NWEAC Members with EnergizeNY



Pre-2009, Westchester County and the NWEAC municipalities within it lagged far behind the statewide participation rates of households that completed Home Performance with ENERGY STAR upgrades annually. Source: EIC & NYSERDA.

NWEAC communities, first in the Town of Bedford as a pilot, and followed by others. By the end of 2011, the participation rate in the NWEAC communities had risen to match the statewide rate. In 2012, a year during which the state-wide rate of participation actually fell, the rate of completed upgrades in the NWEAC communities rose to double that of 2011, pulling the rest of Westchester up along with it.

By early 2013, all of fourteen participating NWEAC municipalities had launched Energize programs using local commu-

nity groups to carry the word to home owners. The impact has been dramatic. The historic completion rate prior to November 2010 would have yielded 206 upgrades in NWEAC municipalities from November 2010 through June 2013. Instead, with Energize activated, 546 home upgrades were completed in that period within the NWEAC communities. The Energize program also had other positive impacts on job creation, emission avoidance, energy savings, and local economic investment.

In areas with Energize's targeted, hyper-local outreach methods,

utilizing existing community leaders as prominent spokespersons, backed with well-organized community events and hands-on assistance for applicants, there were 340 more home upgrades than expected based on previous years. This steep increase in completed home upgrades has a tremendous ripple effect in other beneficial and measurable ways. For example, the improvements in labor and materials represent a 100% increase in local economic investment to \$3.88 million in that same period from what would have been \$1.94 million. According to the US Department of Energy, every \$1

million invested in home energy upgrades generates 9 full time equivalent job years for work (for tradespersons, contractors, etc.). In the Energize time period, a total of 76 job years were created in 2010 through 2013, 144% more than the 31 job years projected. The economic investment in upgrades also produces lower energy bills for homeowners. From NYSERDA's data on the Home Performance with Energy Star program since 2003, the expected 206 homes would have realized a combined four-year fuel savings of \$353,000. After Energize was initiated, as reported by NYSERDA data, the combined fuel savings adding in the other 340 homes upgraded rises to \$628,000, a 78% increase. The fuel savings projections come from the comprehensive home energy assessments conducted for each upgraded home. All those saved dollars are no longer exported out of the community to fuel suppliers. Likewise, the reduced fuel consumption from air-sealing and insulation lead to reductions in greenhouse gas emissions. Per NYSERDA, the expected 206 homes would have avoided total annual emissions of 265 metric tons of carbon dioxide equivalents, using the emission factors for the avoided fuels. Instead, the 546 upgraded homes represented a savings of 471 tons, a 78% improvement.

PART 2: WHAT MAKES A GOOD IMA?

Over 90 percent of municipal governments in the United States have populations under 25,000 (U.S. Census, Governments Division, 2007). In New York, according to the state comptrol-

ler's annual report for 2012, there were 1,602 layered general purpose local governments: 57 counties outside New York City, 62 cities, 932 towns, and 551 villages. Three counties and over half (35) of the state's cities had fewer than 25,000 people while five-sixths of the state's towns had populations under 10,000 and three-fifths of villages were under 2,500 (U.S. Census 2000).

The New York State constitution provides that,

"Local governments shall have power to agree, as authorized by act of the legislature, with the federal government, a state or one or more other governments within or without the state, to provide cooperatively, jointly or by contract any facility, service, activity or undertaking which each participating local government has the power to provide separately."

Intergovernmental agreements are common in areas ranging from sharing wastewater treatment plants, to collaborating in first responder services, to funding solid waste disposal and potable water supply systems. These inter-municipal agreements (IMAs) are usually between at least two governments geographically proximate to each other seeking to achieve economies while delivering essential services in specific places, or responding to new mandates or standards imposed by higher levels of government (Benjamin, 2001).

Article 5-G of the General Municipal Law (§§119-m through

119-oo) implements the New York State constitution's intent, by providing broad authority for "municipal corporations" and "districts" to cooperate with each other. As local governments face pressure to lower costs, the benefits of collaboration and sharing services becomes even more attractive. Such cooperation is often codified in an agreement that spells out the rights and responsibilities of each of the collaborating jurisdictions.

IMAs vary widely in their level of detail. The northern Westchester County municipalities succeeded in drafting a basic IMA creating NWEAC that was both simple and flexible. As noted, the result was very positive, with 100 percent of the targeted municipalities signing on.

The Five E's Test for IMAs

Whether the NWEAC mayors and supervisors were conscious of doing so or not, they were using the state comptroller's office "3 E's" test to determine if a proposed IMA was suitable for meeting goals or objectives:

1. Economy – Will the proposed cooperative arrangement reduce the current program's costs?
2. Efficiency – Will the proposed cooperative arrangement improve the current delivery of program services?
3. Effectiveness – Will the proposed cooperative arrangement allow local governments to deliver needed services that are qualitatively improved or that each would find difficult

to provide individually?”
(NYS OSC 2003, p. 9)

But the evolution of the NWEAC-SWEAC cooperation also demonstrates that adding two more “E’s” to the comptroller’s good advice builds in lasting value:

4. Elasticity – Will the proposed cooperative arrangement be flexible enough to allow additional members to join?

5. Exportability – Will the proposed cooperative arrangement be replicable by other groups of self-organizing municipalities?

Replicability was a goal of NWEAC’s members from the start. In 2010, founding member Mike Gordon of Lewisboro emphasized, “How do we build a green economy and a sustainable economy? And how do we do it here in a way that’s replicable, so what we create here is an example for others?”

Why Sharing Makes Sense to Funders

Hypothetically, if every eligible government in New York State had applied for a Better Buildings grant in 2009, the Department of Energy in Washington would have received over 1,600 grant applications from New York alone. However, if municipalities banded together in groups of ten, that number could be cut down to 160 applications. From an agency perspective, it’s clearly more efficient to evaluate proposals from municipalities that consolidate

to submit one joint application.

Though the DOE initially had no formal process for multi-municipal alliances to apply for the EECBG program, federal and state energy offices found in the first round that localities were asking in writing to be allowed to apply together. By late 2009, as mentioned above, the DOE therefore revised its eligibility rules to allow consortia of local governments as applicants. As it turned out, many of the successful EECBG grant awardees were, in fact, inter-municipal collaborations. At least fifteen of the forty-one funded applications in the nation-wide program within the Recovery Act were municipal alliances between cities and counties or among a group of neighboring jurisdictions.

A more localized example of joining forces as a means to access resources otherwise not available is the Pace Law School Land Use Learning Alliance (LULA) course tailored to sustainability topics. NWEAC and SWEAC member municipalities individually had staff, elected leaders, and volunteers participate in the LULA course over the years. By 2010, it became apparent that devoting a whole course to sustainable land use concepts and practices specifically for the consortia members would be a good team-building and capacity-building exercise. Both consortia collaborated to apply for funding for a five session course. The Westchester Community Foundation generously underwrote it. The course concluded in June 2012 with over thirty elected officials, staff,

and volunteers representing every SWEAC and NWEAC municipality taking part.

PART 3: THE FUTURE

A Sibling to the South

With NWEAC as a model, numerous civic leaders in the Hudson River municipalities in southern Westchester County in 2011 saw the benefits of forming a sister consortium. Even without the direct impetus of a large federal grant application, eleven of these communities, led by volunteers from the villages of Dobbs Ferry, Irvington, and Hastings, signed on to form the Southern Westchester Energy Action Consortium (SWEAC).

As in the northern tier, this ground swell gave some cohesive structure to the numerous, ongoing sustainability efforts in the individual municipalities. While SWEAC did not have the ARRA grant to promote residential energy upgrades, its members did share common concerns. Four of the SWEAC villages are located entirely within the Town of Greenburgh and have regular meetings as members of the Village Officials Committee. So, as with the northern tier, these neighboring municipalities had ample precedent for cross-jurisdictional collaborations. In January 2012, to both announce its formation and inform civic leaders and the broader public of its goals, SWEAC held a well-attended Saturday Sustainability Forum at Sarah Lawrence College. Many NWEAC municipalities were represented at the forum.

While both NWEAC and SWE-

As local governments face pressure to lower costs, **the benefits** of collaboration and sharing services becomes even more attractive.

AC rely heavily on pro-bono volunteers, each of these consortia has generated grant-funded staff positions, as well as the potential for self-financing programs that become fiscally able to stand on their own. In a distinction from NWEAC, SWEAC chose not to charge dues to its members.

Another difference is that, unlike NWEAC, SWEAC was fortunate enough to secure funding for a part-time paid Executive Director to help organize and direct the group's efforts. Nina Orville, a sustainability consultant and chair of the Dobbs Ferry Energy Task Force, was appointed to lead SWEAC and has been the southern counterpart to the northern group's pro bono chair, Herb Oringel.

"At SWEAC, we have chosen not to formalize structures further as we believe the optimal scale of the effort is county-wide," noted Orville. "Efficiencies are enhanced and administrative duplication is minimized through a single larger organization." The SWEAC organizational effort is transitional to something on a larger geographic scale. Therefore, SWEAC has devoted more focus on developing programming, such as sustainability-related resources for the participating municipalities, rather

than building a full non-profit structure. "A critical question for others to consider in contemplating a consortium approach is, 'At what scale is the effort sustainable?'" concluded Orville. "It either needs to be large enough to attract sufficient funding to be able to support necessary staff or modest enough in ambition to work well within limited existing resources."

Where Do We Go From Here?

Both NWEAC and SWEAC have ambitious plans and are developing an increasingly intersecting set of programs and initiatives. The two already exchange ideas on a regular basis, a process accelerated by leaders from both consortia participating in the ongoing Mid-Hudson Regional Sustainability Planning process. Several of the joint efforts currently underway are briefly outlined below.

The Energy Improvement Corporation (EIC)

In order to secure a self-financing future for the Energize Program, as well as for other energy efficiency and renewable energy projects, NWEAC (again with the Town of Bedford as the lead) established the Energy Improvement Corporation (EIC) in 2011 to operate the program. The EIC is a not-for-profit local develop-

ment corporation formed to promote, facilitate, and finance energy audits, renewable energy system feasibility studies, energy efficiency improvements, and alternative or renewable energy generating systems. Bedford will use grant money to fund the EIC's expenses through the termination of the grant in September 2013, covering a paid staff of six and a total annual operating budget of just under \$650,000.

The Energy Improvement Corporation Mission Statement (Adopted October 2011):

"The overarching goal of the Energy Improvement Corporation is to save money and energy, and reduce greenhouse gas emissions in northern Westchester County, and perhaps beyond, by enabling energy-related improvements that meet or exceed state standards through innovative community-based outreach and marketing efforts. In addition, it is a purpose of the corporation to facilitate and finance qualified energy efficiency improvement projects and renewable energy system projects for residents, organizations, institutions, and businesses in participating municipalities in New York State while operating in a financially self-sufficient manner."

Mike Gordon of Lewisboro emphasized, “How do we build **a green economy** and a sustainable economy? And how do we do it here in a way that’s replicable, so what we create here is an example for others?”

Once the EIC was founded, the Town of Bedford officially moved the Energize Program from its offices to separate space operating under the management of the EIC. While the grant monies still flowed from the DOE and NYSEDA through Bedford, the day-to-day reporting and program oversight of Energize NY became the responsibility of the EIC. This consolidated all the energy-related innovations under one inter-municipal umbrella at the EIC. The EIC acts on behalf of its participating municipality members.

The first major initiative of the EIC was a Property Assessed Clean Energy (PACE) finance program for commercial building owners in its member municipalities. Under the PACE financing model, the property owner pays for energy efficiency improvements by authorizing the municipality in which the property is located to add a special assessment (a “financing charge”) to the property tax bill. For many building owners, PACE financing is a much more attractive option than using a credit card or tapping an equity line.

By late spring 2013, nine local governments representing a combined population of over

520,000 had joined the EIC in order to offer the low-cost Energize Finance Program to eligible commercial property owners. As the Commercial PACE financings in the program build up, the fee that the EIC earns for its administrative and capital sourcing role will accumulate sufficiently to make it completely self-financing by 2018. Significantly, the City of White Plains and Orange County, both from outside the northern Westchester area, joined the EIC, thus expanding the footprint of the corporation. As of May 2013, the EIC member municipalities included four towns (Bedford, Lewisboro, North Salem, Pound Ridge), two cities (Peekskill, White Plains) and Orange County (but not the county’s three cities which are their own assessment charge collectors). In Westchester County, local home rule means each municipality needs to opt-in to become an EIC member. In nearly all other counties in New York State, the county may do so on behalf of all towns and villages within the county.

Recently, PACEnow, a new nonprofit located in Westchester County and headed by Bedford’s David Gabrielson, is developing a national clearinghouse for Property Assessed Clean

Energy (PACE) financing. The proximity between staffers and volunteers of both the EIC and the PACEnow results in a regular collaborative exchange of ideas and news.

Municipal Solar Buyers Group

A number of the NWEAC and SWEAC municipalities played a leading role a decade ago in establishing a municipal wind power buyers group in order to support wind farms being installed in upstate New York. Using this buyers group model, NWEAC issued a request for proposals in 2012 for a solar development team to create a municipal buyers group. The chosen solar team will systematically build economies of scale and financing packages to generate solar power as a long-term, least cost energy option for participating municipalities and their communities. The Municipal Solar Buyers Group is currently in the process of identifying suitable sites on public property for photovoltaic installations in all the NWEAC member municipalities and school districts.

Complete Streets

Another shared program initiative includes the promotion of “Complete Streets” to foster safer roads for all modes of travel. A Complete Streets policy, such as

the one adopted first in Lewisboro in 2011, instructs policy-makers and local highway officials to consider all users of the roadways – including pedestrians and cyclists – when making roadway improvements. Concomitantly, SWEAC prepared a “Complete Streets in a Box” toolkit, available online for adoption by any municipality. The essential benefits of a Complete Streets policy are safer roads for all, decreased automobile travel and its carbon footprint impacts, and access to better transit connections for human-powered transportation.

Leaf Mulching

First rolled out by SWEAC municipalities with the Village of Irvington in the lead, NWEAC also promotes the Love ‘Em and Leave ‘Em (LELE) yard mulching program. To quote the LELE team: “Shredding leaves where they are on the lawn, using shredded leaves as a winter mulch on landscape beds, collecting shredded leaves into compost piles, or simply leaving leaves under the trees in wooded areas are all examples of using nature’s own method of turning old leaves into new soil” (Lov’Em and Leav’Em, 2013). The energy reduction benefit is the reduction in transporting and disposing of waste.

Becoming the Go-To Team

In 2011, Governor Andrew M. Cuomo created ten Regional Economic Development Councils (REDC) and the Consolidated Funding Application (CFA) to advance his administration’s efforts to improve New York’s business climate and

expand economic growth. For the Mid-Hudson, seven counties – Dutchess, Orange, Putnam, Rockland, Sullivan, Ulster, Westchester – were now considered a single unit for evaluation of state grant applications and regional planning. Each council developed a strategic plan with input from a broad spectrum of stakeholders, taking into account the unique strengths and challenges of its region. These strategic plans serve as a five-year road map, guiding each region’s efforts to stimulate economic growth.

In early 2012, NYSEDA awarded Regional Sustainability Planning grants. In the Mid-Hudson region, both NWEAC and SWEAC became steering consortium members in this planning process led by the Town of Greenburgh (a SWEAC member) and Orange County. The Mid-Hudson Regional Sustainability Plan, finalized in June of 2013, is an empirically rich document that details a broad set of critical and interlocking activities across a range of policy areas, including agriculture and open space, land use, water, energy, transportation, and materials management. The plan’s focus is on setting targets for lowering the carbon footprint and increasing green jobs and economies. As the Mid-Hudson Sustainability Plan is implemented, the programs proposed by the consortia will hew closely to the principles and the key performance indicators highlighted in the plan.

A large number of NWEAC and SWEAC volunteers participated in the numerous working groups guiding the plan’s development,

keeping their respective mayors and supervisors informed along the way. Key municipal staff members now rely for guidance on consortium volunteers, as well as on the Energize program staff and the EIC board members.

Upcoming Policy Initiatives

Over a relatively brief period, both NWEAC and SWEAC have become important players in crafting and implementing energy policy in the Mid-Hudson region. To cite just one example, at the invitation of the New York State Assembly, leaders from both NWEAC and SWEAC have drafted legislation to create a pilot program in Westchester County for community choice aggregation of electricity supply.

Municipalities across the county have experienced a steep increase in building permit applications for solar systems and are struggling to keep pace with the fast paced development in solar techniques and requirements. In April 2013, the consortia brought the Department of Energy’s SunShot Solar Outreach to Westchester County for a well-attended workshop on the barriers to and opportunities in solar permitting procedures for local governments. As part of the SunShot Solar Outreach Partnership, the county was selected as one of only three locations nation-wide for such workshops offered by the Interstate Renewable Energy Council.

CONCLUSION

Under the Regional Economic Development Council structure, hundreds of millions of dollars in grants and technical assistance

will be available in the current cycle, much of it on a competitive application basis. Each Regional Council will judge applications against how well they fit into the goals of the strategic plan, as well as the implementation agenda. In short, this new, regionalized approach to sorting out which projects get funded makes collaborating with each other even more valuable for New York's hundreds of municipalities. Using local IMA's to align partnerships and define local resources that will be leveraged can only help a project gain more visibility and credibility. Much as Recovery Act funding opportunities brought out the benefits of intermunicipal collaboration for obtaining federal dollars in 2009, New York's new Regional Economic Development Councils, the gatekeepers to the new Consolidated Funding Application process, provide incentives to municipalities to build the best collaborative partnerships.

Sources

For a complete list of works cited for this paper please reference the electronic version on the State University of New York at New Paltz CRREO website: www.newpaltz.edu/crreo

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Comment

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