



VOTING MEMBERS

Alejandro Alvarez
Ebro Darden
M. Kyria Stephens
Allan Gandelman
Garry Johnson
Nikki Kateman
Marc Ramirez
Sarah Ravenhall
Chandra Redfern
Armando Rosado
Peter Shafer

KATHY HOCHUL

Governor

JOSEPH BELLUCK, ESQ.
Cannabis Advisory Board
Chair

JOHN KAGIA
Acting Executive Director

Meeting Minutes

Table with 2 columns: Field (Title, Time & Date, Location) and Value (Meeting of the Cannabis Advisory Board, October 14, 2025, 11:00 AM, Empire State Plaza, Meeting Room 7, Albany, NY 12242)

Attendance

Table with 2 columns: Category (Board Chair, Board Members Present, Remote, Publicly Accessible, Remote, Private, Board Members Absent, Others Present) and Name/Status (Joseph Belluck, Allan Gandelman, Sarah Ravenhall, Pete Shafer, Marc Ramirez, Chandra Redfern, Armando Rosado, Alejandro Alvarez, Ebro Darden, Garry Johnson, Nikki Kateman, M. Kyria Stephens, N/A, Kevin Brennan, Stephen Geskey, Patrick McKeage, Felicia Reid, Jim Rogers, Simone Washington, Matthew Wilson)

Agenda

- I. Welcome and Opening Remarks
II. Approval of Meeting Minutes from May 1, 2025 Cannabis Advisory Board Meeting
III. Community Grants Reinvestment Fund
a. Consideration of Outcomes from Request for Applications [RFA] #2816
b. Consideration of Recommended Criteria for 2025-2026 Grant Cycle
IV. Cannabis Market Update and Discussion
V. Office of Cannabis Management Updates
a. Social and Economic Equity Update
b. School Proximity Update
c. Seed to Sale Update
VI. Adjourn



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Notes & Comments

Chair Belluck opened the meeting by reading the agenda and moving to approve minutes from the May 1, 2025, which passes.

The Chair then provided welcoming remarks, acknowledging former Vice Chair June Chin who has since taken a job within the Office of Cannabis Management, and stepped down from the Cannabis Advisory Board [CAB]. The Chair also provided welcoming remarks to new member of the CAB, M. Kyria Stephens.

The Chair introduced resolution 2025-01 and passed the floor to Matt Wilson, Director of the Community Grants Reinvestment Fund [CGRF] after extending thanks to Governor Hochul, the Office of General Services [OGS], the Office of the State Comptroller [OSC], and Office of Cannabis Management [OCM] Chief Operating Officer Pat McKeage, Lyla Hunt, and Matt Wilson for their work and assistance in navigating the CGRF to this point.

Matt Wilson walked through the process of the CGRF including parameters for the initial RFA #2816, a timeline of events in the application submission and review process and introduced intent to have the CAB formally approve 50 awardees.

451 submissions were received during the application window. 340 applications continued after preliminary screening for minimum eligibility requirements. Those applications were reviewed by three reviewers assigned from 40 OCM staff volunteers, each who were screened for conflicts of interest and took three mandatory trainings.

Wilson then provided a breakdown of how funds would be allocated if approved across focus areas, with all 50 awardees serving youth in the subcategories of mental health, workforce development, and housing. A map was also provided showing distribution of awards across the state, using a two-tiered selection methodology, considering both priority counties as well as Empire State Development Regions [ESDRs].



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Member Sarah Ravenhall expresses support but asked if the Office was pleased with the number of applications received from rural communities, clarifying to mean Southern Tier, North Country and Central New York ESDRs. Wilson states yes, applications were received all throughout the state, with the smallest number of applications coming from North Country, as expected, further stating additional data is available on regional diversity that can be provided. Ravenhall followed up asking of the two selected, is there an intent to increase representation for this region? Wilson replies that the selection methodology will naturally concentrate awards around 13 priority counties, such as New York City, Rochester, Syracuse, and Buffalo. Since these priority counties also exist in ESDRs, they essentially appear twice in the selection methodology. Ravenhall further asks if mental health encompasses harm reduction and substance use disorder, and if any awardees seek to address those services? Wilson confirms yes, the Office took a broad interpretation of mental health, and 3-4 finalists include harm reduction. Ravenhall recommends that future RFAs include language explicitly mentioning harm reduction and substance use disorder. Ravenhall also makes a request that local governments and health departments be made eligible to provide, as they are often underfunded and charged with outreach, education, and reinvestment work. Chair Belluck responds this may be a good way to increase applications and awardees in rural communities where there are not as many non-profit organizations, noting that Acting Executive Director Felicia Reid has raised this point, offering to continue this conversation with Ravenhall at a later date.

Board Member Ebro Darden asked to articulate for the record why harm reduction should be considered a priority within selection criteria. Ravenhall replies it is a way of meeting people where they are at and is a critical component of addressing the specific social determinants that affect their lives. Darden thanks for the clarification and asks Wilson to discuss if this CGRF timeline and model is sustainable. Wilson replies that a compliant procurement process will always be lengthy, but points to two opportunities for a more efficient timeline: more evaluators (with the goal of increasing from 40 to 120 evaluators) and working with procurement partners aligning processes to occur simultaneously. Darden then expressed discontent with the \$5 million figure for grants not increasing for the next RFA despite expected increased tax revenue. Wilson replied this is in part due to statutory obligation to repay debts owed by the Office to the NYS General Fund. Reid also added we also do not know projections for the third round yet, and Chair Belluck added that we are fighting for a lot more than \$5



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million by the third year. Member Garry Johnson asks if there is something in writing that relates to the debt repayment issue, and is it coincidental that \$5 million is the balance again? Reid replied that is in the legislation, and the Office can circulate the language, and considered the allocation by the Department of Budget [DOB] to remain at \$5 million to be a coincidence over an intentional decision. Chair Belluck also reminds caution regarding the school proximity issue potentially detracting from the CGRF.

Board Member Nikki Kateman thanked Wilson and team but flagged in relation to Ravenhall's comment about local governments potentially be considered for funds, that this could be objectionable if the municipality has opted out of recreational adult-use [AU] cannabis sales, and that consideration for these funds should be a point to encourage municipalities to consider opting in. Darden agrees that if a municipality has opted out, they should not be eligible for CGRF funding. Ravenhall replies understanding not existing as an opt out municipality as a qualifier. Board Member M. Kyria Stephens echoes Darden's comments.

Stephens returns to the discussion of increasing the \$5 million total grant funding, asking if there is a plan to make sure this number is increased? Chair Belluck replies that the convening of the CAB and maintaining pressure is the only way to increase and fully fund the CGRF. Ravenhall replies highlighting the work these grantees are doing is likely a good way to pursue an increase in funding, asking if there is a plan to highlight grantees and how the CAB may help. Wilson replies, assuming an affirmative vote occurs today, that there is a plan to work with the Office's press team to highlight this work including a Press Event on Thursday, an awards booklet, coordination with location press, and a plan for evaluative data.

Chair Belluck motioned for a vote on 2025-01 to approve awards for the first round of the CGRF. Johnson interjected to ask if there is a reason the resolution doesn't explicitly mention \$5 million. Chair Belluck responded that the number is included in the Attachment to the resolution. Johnson requested a friendly amendment to add the \$5 million figure to the resolution text. Chair Belluck amended the motion to include the \$5 million figured, moved by Ravenhall and seconded by Johnson. The motion carried with no objections or abstentions.

Chair Belluck handed the floor back to Wilson to discuss resolution 2025-02, concerning parameters for the second RFA.



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Wilson began by sharing event information for an upcoming press event highlighting those awardees, in which CAB members and those interested are invited to attend.

Wilson then began RFA round two discussion stating that continuity is largely recommended, with adjustments made to increase access for smaller organizations, further defining and refining parameters and methodology, and continuing to strengthen and scale operational efficiency and program infrastructure, with the expectation of fund growth in future fiscal years.

Ravenhall interjected, stating that a change from mental health as a broad category to include language explicitly stating harm reduction and substance use disorder is necessary, requesting a friendly amendment to the resolution, which is accepted. Chair Belluck asked that following the meeting, the Office share to the CAB sections of the Marijuana Regulation & Taxation Act [MRTA] that discuss the CGRF. Additional conversation occurred between board members including Board Member Alejandro Alvarez, Darden, Johnson, and Ravenhall discussing how potential funding would interact with OASAS funding in the areas of harm reduction and substance use disorder. Ravenhall stated that these monies would still enter Community-Based Organizations [CBOs] the same way without interacting with OASAS and is no different than other programmatic focus areas interacting with agencies, such as mental health and the Office of Mental Health [OMH], and would be additional rather than supplanting agency work. OASAS delegate Henry Rosen added that the agency is represented on the CAB and active in these discussions.

Wilson continued to discuss changes including a bifurcated applicant pool; one for organizations with previous year operating expenditures below \$2,499,999 (Tier 1) and those with expenditures over \$2,500,000 (Tier 2), allowing smaller organizations to compete against other smaller organizations, rather than competing against large organizations. Another recommended change included a new scale of award amounts for Tier 1 applicants dependent on the size of the organization. Ravenhall asked if this allows the CGRF to assist more organizations, to which Wilson confirms this was designed to allow pathways for smaller organizations without creating potential donor dependency. Darden reminds that State grants are reimbursements, not direct disbursements. Wilson confirmed this but does reference cases in which a 25% advance may be issued which is then recouped. RFA 1 awardees would not be



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eligible for RFA 2 but would potentially be eligible for renewals or to reapply in the 2026-2027 Fiscal Year. Applicants would also be required to score a minimum of 75/100 to be considered, an increase from RFA 1's 65/100. Applicants would also be limited to one application per organization.

Alvarez asked about repayment scheduling for awardees. Wilson stated that awardees can claim up to the entire award amount on their first claim if they have made and documented the expenditures, and that repayment typically takes a net 30 days. Alvarez asked for clarification for a small organization with ideas for services with costs exceeding their previous year expenditures, are they boxed out of applying for additional funding outside the proposed schedule? Wilson stated they are eligible for up to 50% of their previous year expenditures, and if they apply outside their tier, they will be allowed a cure window to revise.

Next steps if approved would be to circulate the RFA among the CAB membership, retooling the online application system, hosting readiness and Statewide Financial System [SFS] support, and preparing the dissemination plan with the goal of launching in late 2025 but more likely early 2026.

Chair Belluck moved to approve resolution 2025-02 criteria for CGRF Round 2, with the friendly amendment to include substance use disorder harm reduction language. Kateman asked if there is still a similar plan to host guidance events, which Wilson confirmed are in the works. Board Member Chandra Redfern asked what consideration is going into entities that are collaborating, given how small some of these organizations are? Wilson stated the Office has made changes to the questions asked of applications to more clearly center their work with communities disproportionately impacted, and that work is being done to make sure evaluators also understand community needs in order to properly score applications. Wilson also outlines a goal to more actively involve communities itself in the awards process. Ravenhall moved the motion, with Board Member Pete Shafer seconding. The motion carried with no objections or abstentions.

Chair Belluck passed the floor to OCM Deputy Director of Policy and Analytics, Kevin Brennan to provide a Market Update to begin a Market Discussion, including cultivation analysis much as a projected 1.2M pounds of biomass at maximum potential. Shafer asked to clarify if data presented was for the calendar year, which Brennan confirmed it was for Calendar Year 2025. Gandelman followed up asking if



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Registered Organization [RO] (ROD/ROND) stats included 10 or 17, to which Brennan clarified this captured 10- just those with the authorization for AU for 2025, and if decisions were made allowing the additional 7 to participate, this could change projections for future years.

Brennan then noted activating canopy begins at licensure but experiences a lag in reaching full potential and discussed OCM's cultivator supply survey, then estimating a 1.19M pound maximum potential yield from existing licensees and stating the State has enough licensed canopy to meet demands through 2027 but the estimated online canopy could leave a potential gap. Gandelman asked if a previously made statement (of X number of retail licenses issued, only 50% will open) applies to cultivation licenses as well. Brennan was unable to provide projections for who will or will not open but noted that the figure nonoperational cultivation licensees was closer to 25%, depended on indoor or outdoor cultivation, with operational cultivators using 50-60% of their canopy. Gandelman noted that some cultivators were struggling to get up and running. Shafer asked about the disparity between smokable flower and available canopy in the state, suggesting that some of that available flower was not grown within the state. Shafer then asked about solutions to addressing the gap, to which Brennan described two routes including organic growth and additional canopy, whether through tier expansion or additional licensure. Brennan continued, stating survey results indicates more canopy will be coming online, with 40.7% of nonoperational respondents planning to come online by end of Calendar Year 2025, 36.8% of respondents likely to request a tier increase in the next 18 months, and 49% of respondents intending to expand cultivation capacity, growing market canopy by approximately 13%. Gandelman asked a follow up regarding 2.2% if respondents who have already requested a tier increase, to which Brennan replied these were requests within already allowable tiers with McKeage confirming the Office is considering tier change amendments within Tier 1 and 2 for Mixed and Indoor and up to Tier 4 for Outdoor.

Shafer commented this is the best data we've seen thus far showing that sales are exceeding growth and that making a stable market includes increased enforcement. Chair Belluck asked OCM Director of the Trade Practices Bureau Jim Rogers and OCM Executive Deputy Director of Licensing, Compliance, and Laboratories Stephen Geskey to discuss the Trade Practices Bureau [TPB] and market integrity, including an explanation of inversion and the process of investigations led by the TPB.



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Gandelman asked a follow up asking where Compliance's role ends and where TPB's role begins, to which Reid comments that the process is typically cross-divisional, including working with OCM's Office of General Counsel [OGC].

Brennan resumed data presentation with the fastest growing A sales, with pre-rolls, concentrates, and beverages with increasing market share growth, with pre-rolls being the fastest growing category. Brennan noted the price for flower has remained relatively flat, with other categories seeing a modest decline in price. Brennan also stated there are over 400 brands in the New York State market, with concentration existing in value-added categories, detailing the market share of the top five brands in each of those categories, and provided an analysis of self-reported retail data detailing where stores are purchasing their product from, with a majority share of 63% purchasing from Processor + Distributors, who are also selling at the highest transaction value. Shafer asked how ROs factored into this breakdown, to which Brennan replied ROs were omitted from the analysis because that data was hard to disaggregate.

Brennan then discussed the geographic location of suppliers, with most being local and microbusinesses tending to be the most local. However, 8.6% of all suppliers sold into all 14 ESDRs in June 2025. Meanwhile, 17.5% of all supplies sold into only one ESDR. Microbusinesses and full stack suppliers had fewer brand offerings than those with cultivation, with an average of 6.9 brands per supplier overall, but only 2.6 average brands per supplier for microbusinesses. Gandelman asked if Tier 3 Processor licenses were included in this analysis, to which Brennan stated they were excluded unless they also had a distributor license. Gandelman asked for data on how many of the total brands in the state were Processor Type 3 to be provided at a later date.

Brennan then discussed sales data where monthly sales continue to increase, with year-to-date sales reaching \$1.26B and experiencing an all-time high in August 2025 at \$214.4M. Additionally, sales per store had reversed a downward trend as more stores matured. Gandelman asked how much growth in monthly sales could be attributed to enforcement and the work of the TPB, to which Brennan commented they couldn't quantify that impact at the moment.

Chair Belluck then passed the floor to OCM Chief Equity Officer Simone Washington to provide a Social and Economic Equity [SEE] update. Washington stated that 56%



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of all AU licenses issued are SEE-owned, with 50 being minority-owned businesses, 57% being women-owned businesses, 16% Communities Disproportionately Impacted [CDI], 7% Service-Disabled Veterans [SDV], and 7% Distressed Farmers. Washington then detailed SEE across the supply chain, with 41% representation in AU cultivators, 48% in AU processors, 45% AU distributors, 59% AU microbusinesses, and 77% in AU retail dispensaries. Washington also noted that while data affirmatively meets MRTA goals, data collection as it currently exists does not paint the most accurate picture of representation, and that moving forward the SEE team will be providing additional data.

Washington then provided updates to upcoming initiatives, including the CAURD/SEE Grant 2.0, CUNY Law Foundation Pro Bono Initiative, SUNY Educational Pipeline Initiative, Business Pro Forma Tool, and the SDVOB and Distressed Farmer Task Forces. Washington also provided updates on core programs, including the Loan and Loan Loss Reserve Fund, Certified Incubator Network, Social Responsibility / Community Impact Plan Framework, and Impact Indicators. Gandel asked if funding streams or loan programs were also being considered for the supply side of the market, or if the CAURD /SEE Grant and loan programs were just for meant for retail. Washington responded no, and that the approach already does involve looking SDV and Distressed Farmers as focal points. Alvarez asked if the social equity plan for license holders is separate from working with local municipalities and funding they may already be receiving, expressing worry of a silo effect and that licensees may not have the acumen on what social equity plans can be. Washington replied that collaboration and creating a throughline is important, and that she will discuss with her team to ensure this coordination with municipalities happens.

Washington then stating that part of her role is internal facing, and her team is working on operationalizing an equity lens in the work and decision making done across all teams in OCM. Alvarez asked how the Office is looking at barriers and removing barriers, and Washington responded discussing the use of a Social Equity Impact tool but pointed to this being a continuous and recurring process of evaluating barriers.

Washington concluded by asking the CAB what information they would most like to see, noting their function is different than the Cannabis Control Board [CCB]. Alvarez commented they would like to see more on communication trainings with municipal



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leaders that may be involved with decision making. Gandelman requested coordination with market team on creating increased insight as to how SEE licensees are performing in comparison to non-SEE licensees, to which Washington commented that this kind of analysis is already in progress. Kateman commented with appreciation for focus on educational pipelines and workforce development, and volunteering her background in workforce in case she may be of any assistance. Chair Belluck stated that the CAB would follow up with any additional questions or requests that the CAB may come up with regarding SEE data.

Chair Belluck then handed the floor to McKeage, who provided an update on the School Proximity issue, stating that a judge had signed a Temporary Restraining Order [TRO] directing the Office to use old standard of measurements for evaluating Public Convenience and Advantage [PCA] requests through February 15, 2026. Additional direction is dependent on the Legislature to change the standard for measurement within the law, and that updates on draft language for that legislative update would be shared with the CAB as available.

McKeage then provided a Seed to Sale [STS] update, stating that the prior contracted company for STS management had experienced a merger, and the Office had considered options under the current contract and determined the best course of action was to procure a new vendor. The deadline for integration under this new vendor is December 17, 2025. The Office is now in the process of identifying a STS administrator contact for each licensee. Informational webinars are upcoming in October 2025 and in-person events in November 2025, to be hosted in Buffalo, Albany, NYC, and Long Island, of which McKeage encourages licensees to attend, and included the email “sts@ocm.ny.gov” for questions licensees may have throughout this process.

Geskey commented the OCM website has links to those events for those interested in attended, as well as a link to the survey for licensees to provide their STS administrator point of contact. Geskey also commented other states are using their STS data to support compliance efforts and expressed excitement for that opportunity. Gandelman commented that he has been receiving many questions from cultivators, processors, and distributors that warrants a different working group session outside of the wider CAB meeting, but highlighted a specific question in which the former vendor BioTrak allowed cultivators to print their own tags and some cultivators had purchased equipment to be able to do so. He stated that the new vendor, Metrc, is known for selling cultivators their own tags which had been a



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decision point between the original two systems. Gandelman asked if cultivators would still be able to print their own tags under the merger, to which McKeage replied that they would be happy to continue this conversation following the meeting.

Chair Belluck thanked the CAB and the Office for their participation and noted that the video and meeting minutes would be posted online on the OCM website "cannabis.ny.gov", and that the next meeting time, location, and viewing link would be posted when available.

Chair Belluck asked for a motion to adjourn, moved by Ravenhall. Chair Belluck seconded the motion. With no oppositions, the meeting was closed.