

KENNETH SCHMITT
Town Supervisor

TOWN OF CARMEL
TOWN HALL

ANN SPOFFORD
Town Clerk

SUZANNE MC DONOUGH
Town Councilwoman
Deputy Supervisor

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Mahopac, New York 10541
Tel. (845) 628-1500 • Fax (845) 628-6836
www.carmelny.org

KATHLEEN KRAUS
Receiver of Taxes

MICHAEL A. BARILE
Town Councilman
JOHN D. LUPINACCI
Town Councilman
JONATHAN SCHNEIDER
Town Councilman

MICHAEL SIMONE
Superintendent of Highways
Tel. (845) 628-7474

TOWN BOARD WORK SESSION
Wednesday, June 26, 2019 7:00pm

Pledge of Allegiance – Moment of Silence

6:00pm Executive Session:

1. Councilman John Lupinacci, John Folchetti, PE, Engineering
Conslt.-Contractual
2. Glenn Droese, Town Assessor – Certiorari Litigation Update
3. Contractual - Town of Carmel Garbage District Contract

Town Board Work Session:

- Review of Town Board Meeting minutes for June 5, 19, 2019
 - 1. Nicholas DiSantis, Alan Kassay, PKF, O'Connor Davies, LLP - Review of 2018 Annual CAFR (Comprehensive Annual Financial Report)
 - 2. Supervisor's Office - Joanna Terilli, Senior Typist/Senior Office Assistant, – Consider Request to Add Part-Time service Full-time Status
 - 3. to Michael Carnazza, Building & Codes Enforcer – Consider Request for Proposals for Property Clean Up and Compliance
 - 4. James Gilchrist, Director of Recreation & Parks – Consider Change Order #1 Airport Park Upgrades C252 (no cost to Town)
 - 5. Police Chief Michael Cazzari – Consider Request to Authorize Payment for Repair and Restoration of Police Boat
 - 6. Richard Franzetti, PE, Town Engineer – Consider Request to Accept Proposal for Concrete Repair – Carmel Town Hall
 - 7. Richard Franzetti, PE, Town Engineer – Consider Request to Accept Proposal for the Preparation for Town of Carmel Comprehensive Plan Including Code Revisions
 - 8. Richard Franzetti, PE, Town Engineer – Consider Request to Accept Proposal for CWD#2 Line Stop Work
 - 9. Michael Simone, Highway Superintendent – Consider Request to Authorize Payment for Emergency Repair Truck #33
 - 10. William Shilling Esq. – Centennial Golf Course Consider Request to Amend Town of Carmel Zoning Code
- **Public Comment (Three (3) Minutes on Agenda Items Only)**
 - **Town Board Member Comments**

Open Forum:

- **Public Comments on New Town Related Business (Three (3) Minutes Maximum for Town Residents, Property Owners & Business Owners Only)**
- **Town Board Member Comments**
- **Adjournment**

Town of Carmel, New York Report to the Town Board December 31, 2018

**KNOW
GREATER
VALUE**

Alan Kassay, Partner

June 26, 2019



Agenda

Audit Results – PKF O’Connor Davies Opinion on Financial Statements

- Fund Balance - General Fund Retrospective
- General Fund - Budget to Actual Summary
- General Fund - Budget to Actual - Revenues
- General Fund - Budget to Actual – Expenditures
- Other Town Funds – Summary
- GASB Statement No. 75 - OPEB
- Summary - Closing Points

Audit Results

We have completed our audit of the 2018 financial statements of the Town of Carmel in accordance with auditing standards generally accepted in the United States of America. The objective of our audit was to **obtain reasonable assurance** about whether these financial statements **are free of material misstatement**. As part of the scope of our work, we reviewed management's accounting estimates and the accounting treatment afforded to all significant accounting matters.

Audit Scope

Our audit approach was directed at the evaluation of all significant aspects of the Town's operations **to reduce audit risks to an acceptable level**. **Our primary focus** was not on individual transactions and balances but **on the financial statements we are opining on taken as a whole**. We are satisfied that the scope of our audit was sufficient to enable us to express our opinion on these financial statements.

We have issued an unmodified (or clean) opinion relating to the Town of Carmel as of December 31, 2018 and for the year then ended.

Fund Balance – General Fund Retrospective

	Increase (Decrease) 2018 vs 2017	2018	2017	2016	2015
<i>Nonspendable -</i>					
Prepaid expenditures	\$ (37,134)	\$ 371,705	\$ 408,839	\$ 389,280	\$ 393,897
<i>Restricted -</i>					
Retirement	-	200,000	200,000	200,000	200,000
Employee benefit accrued liability	170,000	1,785,000	1,615,000	1,440,000	1,000,000
	170,000	1,985,000	1,815,000	1,640,000	1,200,000
<i>Committed -</i>					
Future budgets	-	400,000	400,000	400,000	400,000
Capital projects	500,000	1,500,000	1,000,000	750,000	500,000
Vehicle purchases	-	150,000	150,000	150,000	150,000
	500,000	2,050,000	1,550,000	1,300,000	1,050,000
<i>Assigned</i>					
Purchases on order	121,698	500,516	378,818	152,275	118,210
Tax certiorari	-	770,000	770,000	770,000	770,000
	121,698	1,270,516	1,148,818	922,275	888,210
<i>Unassigned</i>					
	(167,923)	3,319,838	3,487,761	2,881,689	2,172,921
Total Fund Balances	\$ 586,641	\$ 8,997,059	\$ 8,410,418	\$ 7,133,244	\$ 5,705,028

General Fund – Budget to Actual Summary

	<u>Original Budget</u>	<u>Final Budget</u>	<u>Actual</u>		<u>Variance with Final Budget Positive (Negative)</u>
Total Revenues	\$ 19,687,002	\$ 19,946,914	\$ 20,323,689	1	\$ 376,775
Total Expenditures	<u>19,366,320</u>	<u>20,074,993</u>	<u>18,114,897</u>	2	<u>1,960,096</u>
Excess (Deficiency) of Revenues Over Expenditures	320,682	(128,079)	2,208,792		2,336,871
Total Other Financing Uses	<u>(699,500)</u>	<u>(1,621,651)</u>	<u>(1,622,151)</u>	3	<u>(500)</u>
Net Change in Fund Balance	(378,818)	(1,749,730)	586,641		2,336,371
Fund Balance - Beginning of Year	<u>378,818</u>	<u>1,749,730</u>	<u>8,410,418</u>		<u>6,660,688</u>
Fund Balance - End of Year	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 8,997,059</u>		<u>\$ 8,997,059</u>

1 - Revenues increased by 5% over the prior year.

2 - Expenditures increased by 4% over the prior year.

3 - Transfers out: Highway Fund \$256,000, Capital Projects Fund \$206,151, Debt Service Fund \$1,160,000.

General Fund – Budget to Actual Revenues

REVENUES	Budget		Actual	Variance with Final Budget (Negative)
	Original	Final		
Real Property Taxes	\$ 15,063,390	\$ 15,063,390	\$ 15,063,389	\$ (1)
Other Tax Items	108,500	108,500	121,421	12,921
Non-property Taxes	810,000	810,000	764,429	(45,571) 1
Departmental Income	1,488,400	1,513,400	1,477,147	(36,253)
Use of Money and Property	60,000	60,000	158,207	98,207
Licenses and Permits	551,500	551,500	714,527	163,027 2
Fines and Forfeitures	150,000	150,000	154,075	4,075
Sale of Property and Compensation for Loss	30,600	244,212	316,347	72,135
Interfund Revenues	80,000	80,000	88,064	8,064
State Aid	1,097,612	1,117,612	1,195,718	78,106 3
Miscellaneous	247,000	248,300	270,365	22,065
Transfers In	500	500	-	(500)
Total Revenues	\$ 19,687,502	\$ 19,947,414	\$ 20,323,689	\$ 376,275

1 - Cable Franchise Fees

2 - Building, zoning and sanitation fees

3 - Mortgage tax, \$50,000

General Fund – Budget to Actual Expenditures

	Budget		Actual	Variance with Final Budget - Positive (Negative)
	Original	Final		
EXPENDITURES				
Current:				
General Government Support	\$ 6,038,875	\$ 6,073,865	\$ 5,431,964	\$ 641,901 1
Public Safety	10,339,892	10,776,241	9,901,281	874,960 2
Health	19,260	19,260	18,399	861
Transportation	686,492	842,992	810,593	32,399
Culture and Recreation	1,872,906	1,918,820	1,570,854	347,966 3
Home and Community Services	408,895	443,815	381,806	62,009
Transfers Out	700,000	1,622,151	1,622,151	-
Total Expenditures	20,066,320	21,697,144	19,737,048	1,960,096
Net Change in Fund Balance	(378,818)	(1,749,730)	586,641	2,336,371
FUND BALANCE				
Beginning of Year	378,818	1,749,730	8,410,418	6,660,688
End of Year	\$ -	\$ -	\$ 8,997,059	\$ 8,997,059

1 - Spread throughout, Contingency \$174,000.

2 - Police \$704,000

3 - Parks \$331,000

Other Town Funds Summary

	Highway Fund	Special Districts Fund	Debt Service Fund	Capital Projects Fund	Special Purpose Fund
Revenues	8,600,014	13,512,152	906,036	365,909	8,399
Expenditures	(7,190,133)	(12,438,084)	(2,508,416)	(4,291,371)	-
Other financing sources(uses)	(1,444,000)	(683,460)	3,189,778	559,833	-
Net Change in Fund Balance	(34,119)	390,608	1,587,398	(3,365,629)	8,399
Fund Balance (Deficit) - Beginning	1,753,306	13,148,237	1,488,025	(2,524,002)	1,257,495
Fund Balance (Deficit) - Ending	<u>\$ 1,719,187</u>	<u>\$ 13,538,845</u>	<u>\$ 3,075,423</u>	<u>\$ (5,889,631)</u>	<u>\$ 1,265,894</u>

All Funds, except for Capital Projects Fund have positive fund balances at year-end.

Capital Projects Fund deficit is offset by BANs outstanding - \$10.9 million, the deficit will be eliminated as the BANs are paid down.

Special Districts Fund: Fund Balances

Water Districts -	\$3,093,101
Street Lighting Districts -	142,715
Sewer Districts -	2,831,413
Park Districts -	427,670
Fire Protection Districts -	5,544,266
Ambulance District -	927,152
Garbage Districts -	572,528

GASB - Government Accounting Standards Board

Issued GASB Statement No. 75 in June 2015

Accounting and Financial Reporting for Postemployment Benefits Other Than Pensions

Replaced GASB Statement No. 45

Effect of Implementation -

Cummulative Effect of Change in Accounting Principle - \$(41,123,101), Statement of Activities

Net Position, Beginning as Reported	\$ 50,929,564
Cummulative Effect of Change in Accounting Principle	<u>(41,123,101)</u>
Net Position, as Restated	<u><u>\$ 9,806,463</u></u>

Issued an **UNMODIFIED OPINION (CLEAN)**

Received the Certificate of Achievement for Excellence in Financial Reporting - for 26 Consecutive Years

Town has maintained a:

Aa1 Rating from Moodys,

"An Obligor has VERY STRONG capacity to meet its financial commitments."

Issued Report to Those Charged With Governance - "Management Letter", No Material weaknesses noted.



Contact Information

www.pkfod.com

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Nicholas DeSantis, Partner

ndesantis@pkfod.com

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Suite 301
Cranford, NJ 07016
T: 908.272.6200

293 Eisenhower Pkwy
Suite 170
Livingston, NJ 07039
T: 973.535.2880

32 Fostertown Rd
Newburgh, NY 12550
T: 845.565.5400

2 Bethesda Metro Center
Suite 420
Bethesda, MD 20814
T: 301.652.3464

**500 Mamaroneck Avenue
Harrison, NY 10528
T: 914.381.8900**

300 Tice Boulevard
Suite 315
Woodcliff Lake, NJ 07677
T: 201.712.9800

3001 Summer Street
5th Floor East
Stamford, CT 06905
T: 203.323.2400

100 Great Meadow Road
Wethersfield, CT 06109
T: 860.257.1870

40 Westminster Street
Suite 600
Providence, RI 0203
T: 401.621.6200

6 Prince Road
Mahopac, NY 10541

June 16, 2019

Mr. Kenneth Schmitt
Town Supervisor
60 McAlpin Avenue
Mahopac, NY 10541

Dear Supervisor Schmitt and Town Board,

I respectfully request that consideration be given to having my work anniversary date adjusted to include the hours that I worked as a part time employee.

The following are the hours that I worked per year on a part time basis:

- 2019 393.44 hours
- 2018 665.83 hours
- 2017 169.24 hours

It is my understanding that this has been approved in the past. If any further information is needed, please let me know as soon as possible. Thank you in advance for your consideration.

Best regards,



Joanna Terilli

Michael G. Carnazza
Director of Code Enforcement

(845) 628-1500
Ext. 170



60 McAlpin Avenue
Mahopac, New York 10541

MEMORANDUM

TO: Supervisor Kenneth Schmitt &
Members of the Town of Carmel Town Board

FROM: Michael G. Carnazza, Director of Code Enforcement

DATE: June 18, 2019

RE: Property Maintenance Clean-ups

A handwritten signature in blue ink, likely belonging to Michael G. Carnazza, is written over the "FROM:" line of the memorandum.

I would like to have the following properties cleaned under the Property Maintenance code of the Town Of Carmel.

- 105 Longdale Rd. #65.14-1-24- We need to have a contractor clean all litter and debris, mow, weed whack, and rake (or blow) the property. The grass is extremely long and unsightly. There is a car in the driveway but I'm told nobody lives there.
- 39 Colonial Dr., TM#75.11-2-48- Denis sent several Order's to Comply to the owners but never got a reply. The lawn needs to get mowed, weed whacked and raked (or blown). Brush pile needs to get removed.

Thank you,



TOWN OF CARMEL RECREATION & PARKS DEPARTMENT
SYCAMORE PARK, 790 LONG POND ROAD
MAHOPAC, NEW YORK 10541

JAMES R. GILCHRIST, CPRP, DIRECTOR

TELEPHONE: (845) 628-7888 FAX: (845) 628-2820

EMAIL: carmelrecreation@ci.carmel.ny.us

WEB: <http://www.carmelny.org>

DATE: June 18, 2019

TO: Carmel Town Board
Carmel Town Hall

FROM: James R. Gilchrist, CPRP 
Director, Recreation and Parks

SUBJECT: C252 – Airport Park No Cost Change Order No. 1 Request

As the Board is aware, the referenced project was awarded to Argenio Brothers Inc. Due to adverse weather conditions it is recommended that the date for substantial completion be changed to July 7, 2019. This delay was not caused by the Contractor. A more detailed explanation is provided in the attached from Insite Engineering.

In order to ensure appropriate time for the contractor to complete the project, we recommend that the Board authorize the NO COST Work Change Order #1 (attached). The proposed contract completion date would then be on or before July 7, 2019.

Attached please find the proposed **no-cost** Change Order #1. We recommend that the Board approve Change Order #1 and authorize the Supervisor to sign the same.

Please add this to the Town Board Work Session agenda for June 26, 2019, and contact me with any questions.

/ns
Attachment

Change Order

No. 1

Date of Issuance: _____ Effective Date: _____

Project: <i>Town of Carmel Airport Park Phase 1 - Contract C252</i>	Owner: Town of Carmel	Owner's Contract No.: C-252
Contract: Town of Carmel Park and Athletic Complex		Date of Contract: 10/31/2018
Contractor: Argenio Brothers Inc		Engineer's Project No.: 18192.100

The Contract Documents are modified as follows upon execution of this Change Order:

Description:

This change order is for the extension of contract time, given recent adverse weather conditions. This change order also includes a no cost change to the contract for items listed on the attached.

Attachments (list documents supporting change):

See attached for details on directive of work items to be completed with no change to the contract price.

CHANGE IN CONTRACT PRICE:

CHANGE IN CONTRACT TIMES:

Original Contract Price:

\$ _____

[Increase] [Decrease] from previously approved Change Orders No. _____ to No. _____:

\$ _____

Contract Price prior to this Change Order:

\$ _____

[Increase] [Decrease] of this Change Order:

\$ _____

Contract Price incorporating this Change

\$ _____

Original Contract Times: Working days Calendar days

Substantial completion (days or date): 6/8/2019

Ready for final payment (days or date): 9/6/2019

[Increase] [Decrease] from previously approved Change Orders No. - to No. -:

Substantial completion (days): _____ -

Ready for final payment (days): _____ -

Contract Times prior to this Change Order:

Substantial completion (days or date): 6/8/2019

Ready for final payment (days or date): 9/6/2019

[Increase] [Decrease] of this Change Order:

Substantial completion (days or date): 7/7/2019

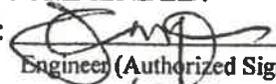
Ready for final payment (days or date): 10/5/2019

Contract Times with all approved Change Orders:

Substantial completion (days or date): 7/7/2019

Ready for final payment (days or date): 10/5/2019

RECOMMENDED:

By: 
Engineer (Authorized Signature)

Date: 6/7/19

Approved by Funding Agency (if applicable): _____

ACCEPTED:

By: _____
Owner (Authorized Signature)

Date: _____

ACCEPTED:

By: 
Contractor (Authorized Signature)

Date: 6/12/19

Date: _____

Change Order Instructions

A. GENERAL INFORMATION

This document was developed to provide a uniform format for handling contract changes that affect Contract Price or Contract Times. Changes that have been initiated by a Work Change Directive must be incorporated into a subsequent Change Order if they affect Price or Times.

Changes that affect Contract Price or Contract Times should be promptly covered by a Change Order. The practice of accumulating Change Orders to reduce the administrative burden may lead to unnecessary disputes.

If Milestones have been listed in the Agreement, any effect of a Change Order thereon should be addressed.

For supplemental instructions and minor changes not involving a change in the Contract Price or Contract Times, a Field Order should be used.

B. COMPLETING THE CHANGE ORDER FORM

Engineer normally initiates the form, including a description of the changes involved and attachments based upon documents and proposals submitted by Contractor, or requests from Owner, or both.

Once Engineer has completed and signed the form, all copies should be sent to Owner or Contractor for approval, depending on whether the Change Order is a true order to the Contractor or the formalization of a negotiated agreement for a previously performed change. After approval by one contracting party, all copies should be sent to the other party for approval. Engineer should make distribution of executed copies after approval by both parties.

If a change only applies to price or to times, cross out the part of the tabulation that does not apply.

Zac Pearson

To: louis@Premiercshv.com
Cc: Jeff Contelmo
Subject: Change Order #1, No Contract Cost Change Items

Lou,

As you are aware we are processing Change Order #1 for the extension on contract time. Additionally as discussed the following work items shall be completed with a no cost change to the contract price.

- Riprap outlet channel extension to meet the channel constructed on County Property.
- Installed Construction Fence to remain for use in Phase 2. Removal by others.
- Installed Silt Fence to remain for use in Phase 2. Removal and final stabilization by others.
- Installed Inlet Protection to remain. Removal and final stabilization by others.
- Exclusion of 50' of the Item 4 Driveway for installation of Phase 2 stabilized construction entrance.
- Temporary Parking Area to remain for duration of Phase 2 work to be eliminated by others.
- Temporary Gate to remain for duration of Phase 2 work to be eliminated by others.

Regards,
Zac

Zachary M. Pearson, PE, Associate
Senior Project Engineer

INSITE ENGINEERING, SURVEYING & LANDSCAPE ARCHITECTURE, P.C.
3 Garrett Place
Carmel, New York 10512
(845) 225-9690 x145
(845) 225-9717 Fax
www.insite-eng.com



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Michael Cazzari
Chief of Police

TOWN OF CARMEL
POLICE DEPARTMENT
60 McAlpin Avenue
Mahopac, New York 10541

(845) 628-1300
Fax (845) 628-2597
www.carmelny.org/police

MEMORANDUM

To: Town Board, Town of Carmel

From: Chief Michael Cazzari

Date: May 31, 2019

Ref: Police Boat repairs - 2019

I am requesting Town Board authorization to compensate the vendor that performed fiberglass repairs to the Police Boat.

At the end of the boating season last year I had the police department's patrol vessel completely cleaned and power washed. Upon inspection of our 21' Boston Whaler it was discovered that the hull had numerous gouges and cuts.

MacDonald Marine believed that the gouges were too deep for their crew to handle and recommended a knowledgeable experienced repair shop that specializes in these types of hull repairs; Jimmy's Marine World has such an expertise.

After the initial gouges were filled I traveled to Jimmy's Marine World in Pleasantville to check on the progress our repairs. Jim Padilla the business owner showed me the extensive cracks in the hull under our police decals, the broken fiberglass cowling over the engine, the torn seat and the worn non-slip coating along the gunnels. I agreed to have the entire hull refurbished and repaired, replaced the non-skid and we added a boat towing bar for assisting other vessels in distress.

These repairs came at a total cost of \$15,113 for the materials and labor. To put this amount in perspective our Boston Whaler was a \$42,000 investment that was left trailered at Sycamore Park and not maintained for several years.

Thanks

MC 

Nº 2518



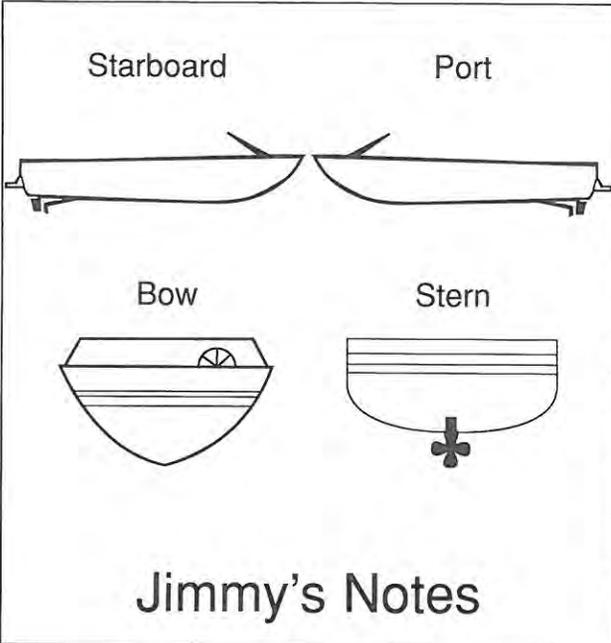
Structural & Cosmetic
Fiberglass Repair

Insurance/Warranty
Claims Specialist

"We Come To You"
914-774-6085

Fax: 914-747-3269
E-mail: jdpamw@gmail.com

Shop-220 Tompkins Ave.
Office-44 Woodland Rd.
Pleasantville, NY 10570



Name <i>Towhee Carmel</i>		H	
Date <i>5/11/19</i>	RO#	W	
Address			
City		State	Zip
Year	Make	Model	
	<i>Boston Whaler</i>		
Hull #		Color <i>Wh</i>	Trim

Qty.	Description	Amount
1/1	Gelcoat <i>Custom Mateck White</i>	436
1/1	Gelcoat <i>Grey Interior</i>	117
	Fiberglass / Gelcoat Repair Mat.	300
	Gelcoat Refinish Materials	400
	Polishing Materials	50
	Decals	
	<i>Towhee Swing Tow Bar</i>	1049
1/1	<i>non skid coatings</i>	74
1/1	<i>Cowl Paint</i>	112
1/1	<i>Clear coat</i>	75
	Total	2613

Fiberglass / Gelcoat Repair Materials (Resin Hardener, Sanding Supplies, Mix Equipment, Fiberglass, Material, Hazardous Waste Removal)

Gelcoat Refinish Materials (Hardener, Acetone, Speed Patch, Mixing Equipment, Sandpaper, Paper, Tape, Cleanup)

Polish Materials (Sandpaper, Compound, Polish, Wax)

Materials	<i>2613</i>
Total Labor	<i>12,000</i>
Pickup / Delivery	
Sublet Repair <i>Seats upholstery</i>	<i>500</i>
Accessories	
Sales Tax	
TOTAL	<i>15,113</i>

Description of Work

Strip hull of all decals and graphics
Repair impact damage around entire hull Port Starboard / Stern
Multiple impacts with exposed fiberglass
Repair fiberglass damage on engine cowl / repaint
Apply new gel coat to the whole boat from the rub rail down
Sand / polish gel coat after cure
Apply non skid coating to the top side deck
Install tow tower to transom
Install new hullside graphics and memorial plaque
Repair multiple impacts on hull bottom
125 hours labor at \$196 per hour

Richard J. Franzetti, P.E.
Town Engineer



(845) 628-1500
(845) 628-2087
Fax (845) 628-7085

Office of the Town Engineer
60 McAlpin Avenue
Mahopac, New York 10541

MEMORANDUM

To: Carmel Town Board

From: Richard J. Franzetti P.E. Town Engineer 

Date: June 13, 2019

Re: R-2019-005- Concrete Repairs at Carmel Town Hall

At the request of the Supervisor, this Department developed an RFP to obtain pricing for concrete repairs to the north entryway at the Town Hall. The RFP was sent to four masons (see attached list). Of the four, only one proposal was received from John Astrologo (attached). One proposal not being optimal, Supervisor Schmitt sought additional pricing from C.K. One Construction Corp. (attached)

The pricing summary is as follows:

John Astrologo	\$14,200.00
C.K. One	\$15,500.00

The Comptroller has advised that sufficient funds exist for this project (see attached email)

John Astrologo has performed several projects for the Town of Carmel in the past, which was inspected by this Department. We have always been satisfied with workmanship, materials and performance. Based upon the above, we recommend that the project be awarded to John Astrologo, for \$14,200.00.

BIDDERS LIST

R2019- CONCRETE REPAIRS AT CARMEL TOWN HALL

John Astrologo
Solid Masonry
38 Ridgewiew Avenue
Mahopac, New York 10541
914-906-2714

Coviello Landscaping
65 Everett Road
Carmel, New York 10512
845-222-7128

Mickey Farina
87 Bullet Hole Road
Mahopac, New York 10541
845-803-2857

Joe Fergosi
82 Anton Drive
Carmel, New York 10512
914-447-7022



PROPOSAL SUBMISSION SHEET
R2019-005
Concrete Repairs at Town Hall

Lump Sum Price:

\$ 15,500
(numbers)

fifteen thousand five hundred
(words)

Submitted By: Ken Gruppiso C.K. ONE Construction Corp.

Title: President

Applicants Legal Address:

28 AIBIN rd
CARMEL NY 10512

[Signature]
Signature

6/12/19
Date

PROPOSAL SUBMISSION SHEET
R2019-005
Concrete Repairs at Town Hall

Lump Sum Price:

\$ 14,200.00
(numbers)

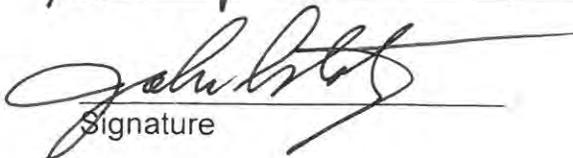
FOURTEEN THOUSAND Two hundred dollars
(words)

Submitted By: JOHN ASTROLOGO

Title: OWNER

Applicants Legal Address:

38 Ridgeview AVE
MAHOPAC NY 10541


Signature

5/28/19
Date

Vara, Rob

From: Maxwell, Mary Ann
Sent: Thursday, June 13, 2019 4:07 PM
To: Vara, Rob; Tenefrancia, Michelle
Cc: Franzetti, Richard; Esteves, Donna
Subject: RE: 06-13-2019 Concrete Repairs at Town Hall R 2019-005

Rob,

There is \$95,730 left in the building & grounds special improvement line. However the cost of the air conditioning unit of \$83,620 will be charged to this line leaving \$12,110 available. I recommend charging it to this line and board authorizing a budget transfer from the contingency line or unreserved fund balance.

Mary Ann

Mary Ann Maxwell
Town Comptroller
Town of Carmel
(845) 628-1500 ext 175
Fax (845) 628-7085
mam@ci.carmel.ny.us

From: Vara, Rob
Sent: Thursday, June 13, 2019 1:43 PM
To: Maxwell, Mary Ann; Tenefrancia, Michelle
Cc: Franzetti, Richard; Esteves, Donna
Subject: 06-13-2019 Concrete Repairs at Town Hall R 2019-005

Max,

We are preparing a memo for the Board, recommending award of concrete repairs at Town Hall. The cost is \$14,200.00. Could you please advise if sufficient funds exist for this work.

Robert Vara
Engineering Projects Coordinator
Town of Carmel
Carmel Town Hall
60 McAlpin Avenue
Mahopac, New York 10541
Ph. 845-628-1500 ex. 183 Fax:845-628-7085

Richard J. Franzetti, P.E.
Town Engineer



(845) 628-1500
(845) 628-2087
Fax (845) 628-7085

Office of the Town Engineer
60 McAlpin Avenue
Mahopac, New York 10541

MEMORANDUM

To: Carmel Town Board

From: Richard J. Franzetti P.E. Town Engineer 

Date: June 18, 2019

Re: RFQ for Town of Carmel Comprehensive Plan and Code Revision

Per the attached resolution on April 17, 2019 the Town Board (Board) authorized the Engineering Department (Department) to issue Request for Qualifications (RFQs) prepare an update of the Comprehensive Plan and to prepare Revisions to the existing Town Code in conjunction with and in conformance with the proposed update of the Comprehensive Plan.

The RFQ was advertised on April 18, 2019 and responses were received by the Engineering Department on May 31, 2019. The RFQ was posted on NYS Bid Net and 17 copies of the RFQ were requested. This Department along with the Town Planner, and Planning and Town Counsel evaluated the submittals in accordance with the criteria outlined in the RFQ. Copies of the RFQ evaluation forms are attached.

Four (4) qualification packages were submitted by the following:

<u>Firm</u>	<u>Ranking Score (average)</u>
1. BFJ Planning	96.3
2. NV5 New York	90.3
3. Nelson, Pope & Voorhis LLC (NP&V)	90.2
4. MJ Engineering and Land Surveying	82.4

The RFQ identified that based on the evaluation of the submitted qualifications that three (3) respondents will be selected by the Town for price proposals/interviews. It is recommended that the three (3) respondents to be selected for price proposals/interviews be are BFJ Planning, NV5 New York, and NP&V.

**RESOLUTION AUTHORIZING REQUEST FOR QUALIFICATIONS
TOWN OF CARMEL COMPREHENSIVE PLAN AND TOWN CODE REVISIONS**

RESOLVED that the Town Board of the Town of Carmel authorizes the issuance of a Request for Qualifications for development and preparation of the Town of Carmel Comprehensive Plan and proposed Town of Carmel Town Code Review and Revisions by the Town of Carmel Engineering Department.

Resolution

Offered by: Councilman Barile
 Seconded by: Councilwoman McDonough

<u>Roll Call Vote</u>	<u>YES</u>	<u>NO</u>	
Michael Barile	<u>X</u>	<u> </u>	
Jonathan Schneider	<u> </u>	<u> </u>	Absent
John Lupinacci	<u> </u>	<u> </u>	Absent
Suzanne McDonough	<u>X</u>	<u> </u>	
Kenneth Schmitt	<u>X</u>	<u> </u>	

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I, Ann Spofford, Town Clerk of the Town of Carmel, Putnam County, New York, do hereby certify that the foregoing resolution is a true and exact copy of the original on file in my office which was adopted by the Town Board of said Town at a duly called and held meeting on the 17th day of **April, 2019**; and of the whole thereof.

April 18, 2019
Dated



 Ann Spofford, Town Clerk

Notice

Basic Information

Reference Number 0000213395
Issuing Organization Town of Carmel
Owner Organization Town of Carmel
Solicitation Type RFQ - Request for Qualifications (Formal)
Solicitation Number RFQ-2019-001
Title Town of Carmel Putnam County New York COMPREHENSIVE PLAN AND TOWN CODE REVISIONS
Source ID PU.AG.USA.1966.C3881751
Piggyback Solicitation No

Details

Location Putnam County, New York
Purchase Type One Time Only
Description The Town of Carmel, Putnam County, New York issuing this Request for Qualifications (RFQ) to solicit statements of qualifications and approach from well-qualified professional planning consultant experienced with municipal comprehensive plan development to submit a proposal to prepare an update of the **Comprehensive Plan**.

The Town of Carmel is also issuing this Request for Qualifications (RFQ) to solicit statements of qualifications and approach from well-qualified professional legal consultant's experienced with adoption and revisions of municipal codes, including but not limited to zoning, planning and land use components of said codes, to submit a proposal to prepare **Revisions to the existing Town Code** in conjunction with and in conformance with the proposed update of the Comprehensive Plan.

Dates

Publication 04/17/2019 11:34 AM EDT
Question Acceptance Deadline 05/17/2019 11:00 AM EDT
Questions are submitted online No
Closing Date 05/31/2019 11:00 AM EDT

Contact Information

Richard Franzetti
8456281500
rjf@ci.carmel.ny.us

Buyer's Requirements

General Requirements
- Certification/Training
- License Required

Bid Submission Process

Bid Submission Type Physical Bid Submission
Additional Bidding Instructions DEADLINE FOR QUESTIONS: 11:00 AM May 17, 2019
DUE DATE: Sealed Qualification Packages will be received until 11:00 AM, May 31, 2019.
ADDRESS: Qualification Packages should be mailed or hand delivered to:
Town of Carmel Town Engineer
60 McAlpin Avenue
Mahopac, NY 10541
RE: RFQ-2019-001
Town of Carmel Comprehensive Plan and Town Code Revisions

Documents

Documents

Document	Size	Uploaded Date	Language
RFQ 2019-001- Compresehvsive Plan Notice .pdf [pdf]	120 Kb	04/16/2019 02:39 PM EDT	English

Categories

Selected Categories

NIGP Categories (7)	
925	ENGINEERING SERVICES, PROFESSIONAL
92500	ENGINEERING SERVICES, PROFESSIONAL
92561	Land Development and Planning/Engineering Land Development And Planning Services (Engineering), Development And Planning, Land (Engineering), Planning And Development, Land (Engineering)
92570	Municipal Engineering Municipal Engineering Services
92533	Engineer Services, Professional Engineer Services, Professional, Professional Engineer Services
918	CONSULTING SERVICES
91842	Engineering Consulting Consulting Services, Engineering, Engineering, Consulting Services
906	ARCHITECTURAL SERVICES, PROFESSIONAL
90600	ARCHITECTURAL SERVICES, PROFESSIONAL
907	ARCHITECTURAL AND ENGINEERING SERVICES, NON-PROFESSIONAL
90700	ARCHITECTURAL AND ENGINEERING SERVICES, NON-PROFESSIONAL

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Document Request List

Document Request List

Organization Name	Main Contact	Download Date	City	Province/State
BrainSurface LLC	Omar Farooq	05/22/2019 08:06 PM EDT	Dallas	Texas
Bergmann Associates	Joanna Brumley	05/08/2019 03:50 PM EDT	Rochester	New York
Goldberg Segalla LLP	Dana Bennett	04/26/2019 02:29 PM EDT	Buffalo	New York
Sam Schwartz Engineering	Lauren Ormerod	04/25/2019 01:00 PM EDT	New York	New York
Network Solutions & Technology	Anthony Pisano	04/23/2019 04:08 PM EDT	East Northport	New York
AKRF, Inc.	Elizabeth Tomasello	04/22/2019 12:55 PM EDT	New York	New York
Lothrop Associates LLP	ARTHUR SECKLER	04/22/2019 12:43 PM EDT	WHITE PLAINS	New York
CME Associates	Jennifer Razzano	04/22/2019 09:05 AM EDT	Howell	New Jersey
NV5 New York - Architects Engineers Landscape Architects & Surveyors	Alicia Petrulis	04/20/2019 03:41 PM EDT	New York	New York
Behan Associates Landscape Architecture and Engineering, D.P.C.	Cynthia Behan	04/18/2019 04:14 PM EDT	Saratoga Springs	New York
wright-pierce	Susan OConnor	04/18/2019 03:57 PM EDT	maitland	Florida
H2M architects + engineers	Nicole Kurek	04/18/2019 11:35 AM EDT	Melville	New York
Integrated Marketing Systems (IMS)	Nick Benore	04/18/2019 11:18 AM EDT	San Diego	California
MGT of America Consulting, LLC	Shannon Blakey	04/18/2019 10:46 AM EDT	Tampa	Florida
Community Planning & Environmental Associates	Nan Stolzenburg	04/18/2019 10:21 AM EDT	Berne	New York
GPI/Greenman-Pedersen, Inc.	Heather Pace	04/18/2019 09:59 AM EDT	Albany	New York
PS&S Engineering Inc.	William Schneider	04/18/2019 08:30 AM EDT	Yonkers	New York
IDMC	Bill Philips	04/18/2019 12:04 AM EDT	Grand Junction	Colorado
DeAngelis Architectural Services, LLC	Brian Burke	04/17/2019 04:28 PM EDT	Mamaroneck	New York
M.J. Engineering and Land Surveying, P.C.	Becky Cahill	04/17/2019 03:32 PM EDT	Clifton Park	New York
Laberge Group	Richard F. Laberge	04/17/2019 03:26 PM EDT	Albany	New York
Sterling Environmental Engineering, P.C.	Mark Millspaugh	04/17/2019 03:22 PM EDT	Latham	New York
JMT of NY, Inc.	Lynn Resta	04/17/2019 02:43 PM EDT	Latham	New York
Hardesty & Hanover	David Lapping	04/17/2019 02:27 PM EDT	New York	New York
Brooker Engineering	Joseph Moran	04/17/2019 02:17 PM EDT	Suffern	New York
Fusco Engineering and Land Surveying, P.C.	Alfred Fusco	04/17/2019 02:17 PM EDT	Middletown	New York
CHA	Brooke Wilson	04/17/2019 12:55 PM EDT	Albany	New York
D&B Engineers and Architects, P.C.	Robert Anderson	04/17/2019 12:38 PM EDT	Woodbury	New York

Organization Name	Main Contact	Download Date	City	Province/State
Environmental Design & Research, P.C.	Joanne Stewart	04/17/2019 12:35 PM EDT	Syracuse	New York
SIMCO Engineering, P.C.	Amir Siddiqui	04/17/2019 12:14 PM EDT	New York	New York
Elan Planning, Design & Landscape Architecture, PL	John Caraco	04/17/2019 12:13 PM EDT	Saratoga Springs	New York
The LA Group Landscape Architecture and Eng., P.C.	Angie Mickel	04/17/2019 12:02 PM EDT	Saratoga Springs	New York
Provident Design Engineering, PLLC	Charles Holt	04/17/2019 11:55 AM EDT	Hawthorne	New York
Dunn and Sgromo Engineers	Gregory Sgromo	04/17/2019 11:54 AM EDT	East Syracuse	New York
Passero Associates	Kim Perry	04/17/2019 11:54 AM EDT	Rochester	New York
Cameron Engineering & Associates, LLP	Laura Liu	04/17/2019 11:51 AM EDT	Woodbury	New York
The Chazen Companies	Sylvia Gersbach	04/17/2019 11:51 AM EDT	Poughkeepsie	New York
Barton & Loguidice, D.P.C.	Brenda Gray	04/17/2019 11:48 AM EDT	Albany	New York
Weston & Sampson	Amy Patton	04/17/2019 11:45 AM EDT	Albany	New York

	Name	Date modified	Type	Size
★ Quick access				
My Documents	AKRF	4/24/2019 3:57 PM	File folder	
Downloads	E&L	4/22/2019 1:53 PM	File folder	
Dropbox	Behan Engineering	4/25/2019 11:22 AM	File folder	
Engineering	Eergmann A&E	5/8/2019 4:02 PM	File folder	
DjVu_Files	Cameron Engineering	5/15/2019 2:36 PM	File folder	
Desktop	CP&EA	4/23/2019 12:30 PM	File folder	
Pictures	EDR	4/22/2019 10:09 AM	File folder	
Favorites	FCA	4/22/2019 10:04 AM	File folder	
NYC DEP - Kirk L	Fuscc Engineering	4/22/2019 10:01 AM	File folder	
44.14-1-90 - 33 v	H2M	4/22/2019 10:02 AM	File folder	
63.20-1-50 - 220	Holland	4/23/2019 10:40 AM	File folder	
01 - Evaluation	Laerge Group	5/3/2019 10:43 AM	File folder	
11-16-10 - 5903 Cor	M. Engineering	4/22/2019 9:50 AM	File folder	
M6-2019	MRB Group	4/23/2019 3:44 PM	File folder	
RFQ- 2019-001 - To	Nelson Pope	4/22/2019 2:37 PM	File folder	
	NVS	4/22/2019 1:59 PM	File folder	
	Planning 4 places	4/22/2019 1:59 PM	File folder	
	04-18-19 - RFC-2019-001 - Town Compr...	4/22/2019 9:35 AM	Adobe Acrobat D...	1,066 KB

Desktop

Dropbox

Franzetti, Richard

This PC

Libraries

Network

Control Panel

Recycle Bin

VIDEO_TS



RFQ-2019-001 - TOWN OF CARMEL PUTNAM COUNTY NEW YORK COMPREHENSIVE PLAN AND T... (CLOSED)

Actions

- Preview Addendum Bid Results Award Audit

Please note that solicitations issued prior to October 29, 2016 can be found here: http://legacy.empirestatebidsystem.com



- Notice Documents Categories Document Request List

Print

Basic Information

Reference Number 0000213395

Dates

Issuing Organization Town of Carmel

Publication Date 04/17/2019 11:34 AM EDT

Owner Organization Town of Carmel

Question Acceptance Deadline 05/17/2019 11:00 AM EDT

Solicitation Type RFQ - Request for Qualifications (Formal)

Questions are No

Solicitation Number RFQ-2019-001

submitted online

Title Town of Carmel Putnam County New York COMPREHENSIVE PLAN AND TOWN CODE REVISIONS

Closing Date 05/31/2019 11:00 AM EDT

Source ID PU.AG USA 1966.C3881751

Contact Information

Richard Franzetti

Details

8456281500

Location United States, New York, Putnam County

rjf@ci.carmel.ny.us

Piggyback Contract No

Description The Town of Carmel, Putnam County, New York issuing this Request for Qualifications (RFQ) to solicit statements of qualifications and approach from well-qualified professional planning consultant experienced with municipal comprehensive plan development to submit a proposal to prepare an update of the Comprehensive Plan.

See more

	MAXIMUM SCORE	Nelson, Pope & Voorhis LLC	NV5	BFJ Planning	MJ Engineering and Land Surveying
RJF	100	88.51	94.67	97.15	80.27
PC	100	90.5	89	95	81.5
BF	100	91.5	87.33	96.8	85.5
Average	100	90.17	90.33	96.32	82.42

EVALUATION CRITERIA	MAXIMUM SCORE				
		Nelson, Pope & Voorhis LLC	NV5	BFJ Planning	MJ Engineering and Land Surveying
Corporate Capabilities & Qualifications 20%					
PROJECT REPORTS (10) OF OTHER SIZE AND SCOPE	6.67	6.67	2.67	6.67	2.67
CORPORATE PROFILE	6.67	6.67	5.00	6.67	6.67
CAPABILITIES	6.67	6.67	6.67	6.67	6.67
SUBTOTAL	20	20	14.33	20	16
Personnel Capabilities & Qualifications 25%					
CAPABILITY PROJECT MGMT TEAM	12.5	12.5	12.5	12.5	12.5
CAPABILITY PROJECT STAFFING TEAM	12.5	12.5	12.5	12.5	12.5
SUBTOTAL	25	25	25	25	25
Project Approach & Understanding of Town Goals 30%					
PROJECT APPROACH	15	12	14	15	11
UNDERSTANDING	15	15	15	15	15
SUBTOTAL	30	27	29	30	26
Specialized Experience & Reference Checks 15%					
REFERENCES (5)	7.5	6	4.5	7.5	6
SPECIALIZED EXPERIENCE	7.5	6.5	4.5	7.5	5.5
SUBTOTAL	15	12.5	9	15	11.5
Proposed Schedule 10%					
PROPOSED SCHEDULE	10	7	10	6.8	7
SUBTOTAL	10	7	10	6.8	7
TOTAL	100	91.5	87.33	96.8	85.5

EVALUATION CRITERIA	MAXIMUM SCORE				
		Nelson, Pope & Voorhis LLC	NV5	BFJ Planning	MJ Engineering and Land Surveying
Corporate Capabilities & Qualifications 20%					
PROJECT REPORTS (10) OF OTHER SIZE AND SCOPE	6.67	6.67	4.00	6.67	3.33
CORPORATE PROFILE	6.67	6.67	6.67	6.67	6.67
CAPABILITIES	6.67	5.50	6.00	6.67	5.00
SUBTOTAL	20.00	18.84	16.67	20.01	15.00
Personnel Capabilities & Qualifications 25%					
CAPABILITY PROJECT MGMT TEAM	12.50	12.50	12.50	12.50	12.50
CAPABILITY PROJECT STAFFING TEAM	12.50	12.50	12.50	12.50	12.50
SUBTOTAL	25.00	25.00	25.00	25.00	25.00
Project Approach & Understanding of Town Goals 30%					
PROJECT APPROACH	15.00	10.00	14.00	15.00	10.00
UNDERSTANDING	15.00	13.00	15.00	15.00	13.00
SUBTOTAL	30.00	23.00	29.00	30.00	23.00
Specialized Experience & Reference Checks 15%					
REFERENCES (5)	7.50	7.50	7.50	7.50	7.50
SPECIALIZED EXPERIENCE	7.50	7.50	6.50	7.50	4.50
SUBTOTAL	15.00	15.00	14.00	15.00	12.00
Proposed Schedule 10%					
PROPOSED SCHEDULE	10.00	6.67	10.00	7.14	5.26
SUBTOTAL	10.00	6.67	10.00	7.14	5.26
TOTAL	100.00	88.51	94.67	97.15	80.27

EVALUATION CRITERIA	MAXIMUM SCORE				
		Nelson, Pope & Voorhis LLC	NV5	BFJ Planning	MJ Engineering and Land Surveying
Corporate Capabilities & Qualifications 20%					
PROJECT REPORTS (10) OF OTHER SIZE AND SCOPE	6.67	5	5	6	4
CORPORATE PROFILE	6.67	6	6	6	6
CAPABILITIES	6.67	6	6	6	5
SUBTOTAL	20	17	17	18	15
Personnel Capabilities & Qualifications 25%					
CAPABILITY PROJECT MGMT TEAM	12.5	11	11	11	11
CAPABILITY PROJECT STAFFING TEAM	12.5	11	10	12	9
SUBTOTAL	25	22	21	23	20
Project Approach & Understanding of Town Goals 30%					
PROJECT APPROACH	15	15	15	15	15
UNDERSTANDING	15	14	13	14	11
SUBTOTAL	30	29	28	29	26
Specialized Experience & Reference Checks 15%					
REFERENCES (5)	7.5	6	6	7.5	5.5
SPECIALIZED EXPERIENCE	7.5	6.5	7	7.5	6
SUBTOTAL	15	12.5	13	15	11.5
Proposed Schedule 10%					
PROPOSED SCHEDULE	10	10	10	10	9
SUBTOTAL	10	10	10	10	9
TOTAL	100	90.5	89	95	81.5

Richard J. Franzetti, P.E.
Town Engineer



(845) 628-1500
(845) 628-2087
Fax (845) 628-7085

Office of the Town Engineer
60 McAlpin Avenue
Mahopac, New York 10541

MEMORANDUM

To: Carmel Town Board

From: Richard J. Franzetti P.E. Town Engineer 

Date: June 18, 2019

Re: CWD 2 Request for Tap

The C246 CWD 2 project is about to be completed. All that is remaining is that the contractor will need to disconnect the last tie to the abandoned section of the CWD 2 distribution system that is being replaced. The cutoff point is at the intersection of 301/Fowler/Ridge, the local low point in the system.

As outlined in the attached email from JRFA, valves in this area are not able to closed water so as to isolate the system. The attached provides the location of valves that are being discussed herein:

- Valves at Fowler/Ridge/301 immediately upstream of our cut off (1) either leak or are inoperable.
- The next valve upstream of that (2), at the intersection of 301 & 52, also leaks. T
- The only known operational valves are at 52/6 to the south and 52/Fowler/Vink (3A & 3B).

Shutting these valves to control the water will stop water flow within the Hamlet of Carmel for an extended period of time as it will take time to drain the system in this area. The alternative is the installation of a line stop immediately upstream of the proposed cut. This process does not require that valves be turned off and will maintain flow to the remainder of the system.

The attached proposals were requests/ received for the line stop work:

- Pro Tap/Kuck (excavating) 7,522 +\$8,000 = \$15,522.00
- Legacy Supply \$19,000.00

As the issue at hand is an operational issue not a capital project issue, the line stop should be paid out of repair funds. Per the attached there are sufficient funds for this work.

In the interest of completing the C246 project and avoiding a possible time extension request (i.e. no -cost change order) we respectfully ask that the Board move forwarding with approving this request.

From: [John Folchetti](#)
To: [Franzetti, Richard](#)
Cc: [Brann, Thomas \(Thomas.Brann@inframark.com\)](#)
Subject: Last cut off for CWD 2
Date: Wednesday, June 05, 2019 4:07:36 PM
Attachments: [20190605162815.pdf](#)

Rich,

Per our meetings yesterday (Legacy Supply) & today (Inframark):

We need to disconnect the last tie to the abandoned section of the CWD 2 distribution system that is being replaced under the

Emergency Watermain Replacement project. The cut off point is at the intersection of 301/Fowler/Ridge. This is the local low point in the system.

Control of the system is critical to this cut off because there is no other way to bleed all the area lines. See attachment for location of valves described herein.

All the valves at Fowler/Ridge/301 immediately upstream of our cut off (1) either leak or are inoperable. The next valve upstream of that (2), at the intersection of 301 & 52, also leaks. The known operational valves are at 52/6 to the south and 52/Fowler/Vink (3A & 3B).

Shutting these valves to ensure minimum down time

& a clean cut off operation without lost water or extended shutdown will stop water flow to all county facilities plus restaurants, churches & commercial establishments at the heart of the hamlet.

The alternative is the installation of a linestop immediately upstream of the proposed cut. This ensures control and maintains flow to the remainder of the system.

Tom has solicited a proposal from an outfit in NJ & I have solicited one from Legacy Supply.

As the issue at hand is an operational issue not a capital project issue, the linestop should be paid out of repair funds.

Any questions please call.

J. E. Folchetti, P.E.

CEO

J. Robert Folchetti & Associates

31 Sodom Road

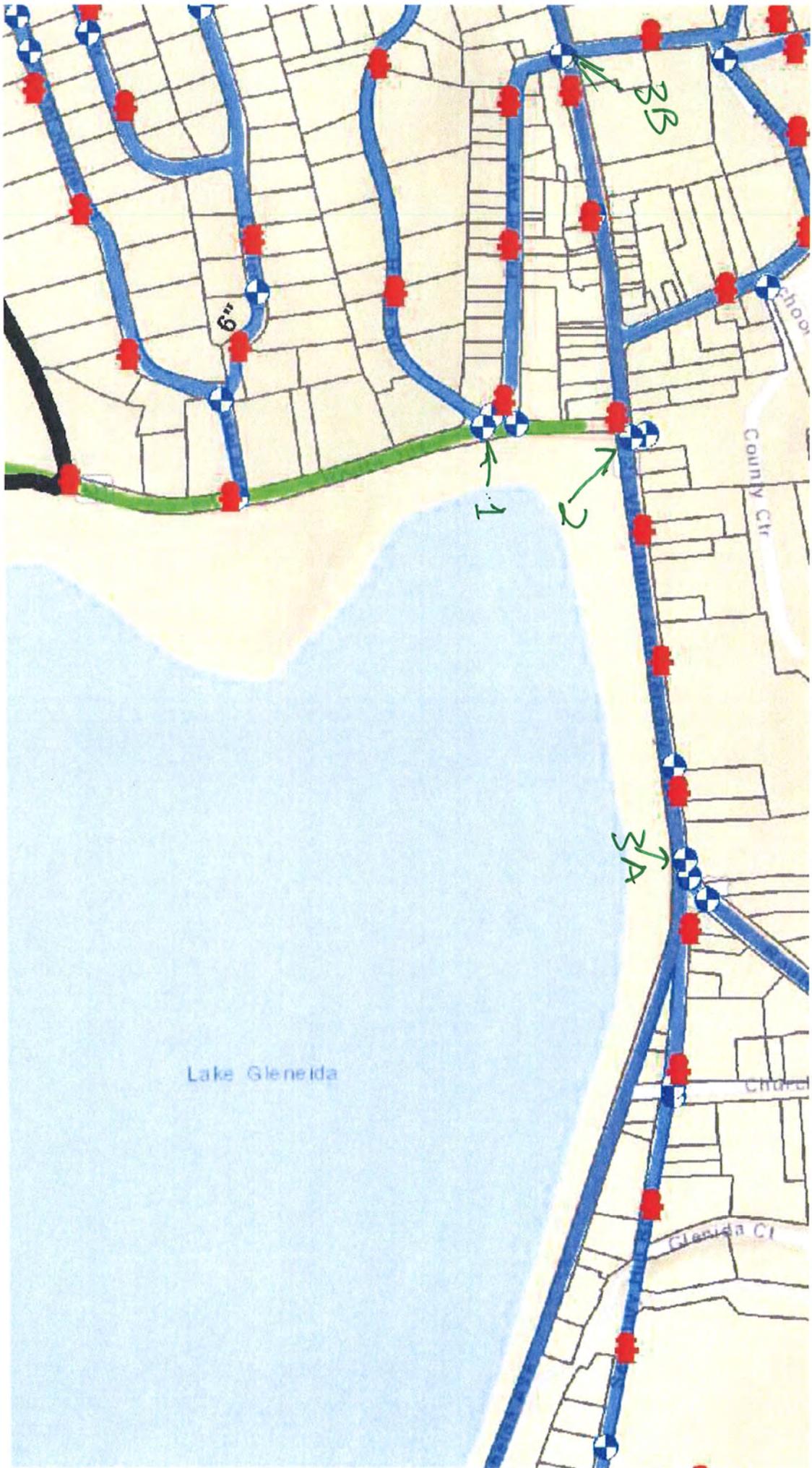
Brewster, NY 10509

Tel: (845) 363 1560

Fax: (845) 279 2062

Email: John.Folchetti@JRFA.com

Website: www.JRFA.com



From: [John Folchetti](#)
To: [Franzetti, Richard](#)
Subject: RE: 06-05-19 RE: Last cut off for CWD 2
Date: Wednesday, June 05, 2019 4:15:20 PM

It's ~ 19. We need to get a price from someone else to do the excavation/backfill/restoration/traffic control for Tom's guy because their proposal is linestop only

J. E. Folchetti, P.E.

CEO

J. Robert Folchetti & Associates

31 Sodom Road

Brewster, NY 10509

Tel: (845) 363 1560

Fax: (845) 279 2062

Email: John.Folchetti@JRFA.com

Website: www.JRFA.com

From: Franzetti, Richard [mailto:rjf@ci.carmel.ny.us]

Sent: Wednesday, June 05, 2019 4:11 PM

To: John Folchetti

Cc: Brann, Thomas (Thomas.Brann@inframark.com)

Subject: 06-05-19 RE: Last cut off for CWD 2

Thanks

Let me know what the cost proposal for Legacy once you receive.

Richard J. Franzetti, P.E, BCEE

Town Engineer

60 McAlpin Avenue

Mahopac, New York 10541

Phone - (845) 628-1500 ext 181

Fax – (845) 628-7085

Cell – (914) 843-4704

rjf@ci.carmel.ny.us

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From: John Folchetti [mailto:John.Folchetti@jrfa.com]

Sent: Wednesday, June 05, 2019 4:07 PM

To: Franzetti, Richard

Cc: Brann, Thomas (Thomas.Brann@inframark.com)

Subject: Last cut off for CWD 2

Rich,

Per our meetings yesterday (Legacy Supply) & today (Inframark):

We need to disconnect the last tie to the abandoned section of the CWD 2 distribution system that is being replaced under the

Emergency Watermain Replacement project. The cut off point is at the intersection of 301/Fowler/Ridge. This is the local low point in the system.

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All the valves at Fowler/Ridge/301 immediately upstream of our cut off (1) either leak or are inoperable. The next valve upstream of that (2), at the intersection of 301 & 52, also leaks. The known operational valves are at 52/6 to the south and 52/Fowler/Vink (3A & 3B). Shutting these valves to ensure minimum down time & a clean cut off operation without lost water or extended shutdown will stop water flow to all county facilities plus restaurants, churches & commercial establishments at the heart of the hamlet.

The alternative is the installation of a linestop immediately upstream of the proposed cut. This ensures control and maintains flow to the remainder of the system.

Tom has solicited a proposal from an outfit in NJ & I have solicited one from Legacy Supply. As the issue at hand is an operational issue not a capital project issue, the linestop should be paid out of repair funds.

Any questions please call.

J. E. Folchetti, P.E.

CEO

J. Robert Folchetti & Associates

31 Sodom Road

Brewster, NY 10509

Tel: (845) 363 1560

Fax:(845) 279 2062

Email: John.Folchetti@JRFA.com

Website: www.JRFA.com



Pro Tapping Inc.
620 Gravelly Hollow Road
Medford, NJ 08055
(856) 983-5442
Fax (856) 985-8621
www.protapping.com
info@protapping.com

FROM: CHRISTAL

CUSTOMER RESPONSIBILITIES
see 2nd page

PRO TAPPING INC. RESPONSIBILITIES:

TAPPING SLEEVE:

- MUELLER US PIPE FABRICATED OTHER

TAPPING VALVE:

- MUELLER US PIPE OTHER

INSERTION VALVE & SLEEVE:

- EZ VALVE

VALVE BOX:

- ADJUSTABLE WITH LID

LINE STOP FITTING:

- with COMPLETION PLUG & BLIND FLANGE

TAPPING SADDLE:

- FABRICATED

CORPORATION BALL VALVE:

- MUELLER OTHER

CURB STOP:

- MUELLER OTHER

CURB BOX:

- MUELLER OTHER

MUELLER ADAPTER NUT:

- IPO COMPRESSION

OTHER:

TAP ONLY:

(With PTI to air test* and tap only)

INSTALL, TEST & TAP:

(With PTI to air test* and tap only)

* Air test varies in duration and pressure per service, please contact office for specifics.

* Additional charge for hydrostatic testing, see page 2.

DATE: 06/05/2019

BUSINESS: (845) 628 - 1500 x

FAX: (845) 000 - 0000

CELL PHONE: (845) 392 - 7661

CELL PHONE: () -

JOB SITE: () - x

JOB SITE: () - x

OTHER PHONE: () -

EMAIL: THOMAS.BRANN@INFRAMARK.COM

EXACT PRODUCT IN MAIN PIPELINE:

- WATER SEWER

EXACT WORKING PRESSURE: 95 #

EXACT FEET PER SECOND: MAX 3 FPS

EXACT JOB LOCATION:

RIDGE ROAD/ROUTE 301

CARMEL, NY

QUOTED PRICE:

\$ 6,963.00 EACH RT 6" LINE STOP

OR

\$ 7,522.00 EACH RT 8" LINE STOP

- SAFETY ORIENTATION OCIP CERTIFIED PAYROLL

FREIGHT CHARGE:

COMMENTS:

CUSTOMER NEEDS TO VERIFY OD OF PIPE PRIOR TO

SCHEDULING.

INITIAL

ATTN: TOM BRANN

CO. NAME: TOWN OF CARMEL

ADDRESS: 60 MCALPIN AVENUE

MAHOPAC, NY 10541

(QUANTITY) MAIN SIZE X OUTLET SIZE

(1) 6" LINE STOP

() OR

(1) 8" LINE STOP

()

()

VALVE OUTLET:

- MJ FLG

VALVE OPENS:

- OL OR

CORPORATION OUTLET:

- FCO IPO COMPRESSION

MAIN PIPELINE MATERIAL:

- DI CI TRANSITE PVC

- PCCP HDPE

OUTSIDE DIAMETER:

CIRCUMFERENCE:

WALL THICKNESS:

ALL SALES FINAL.

Quotes valid for 30 days from above date

WET TAPS LINE STOPS VALVE INSERTIONS
SBE CERTIFIED

CUSTOMER'S RESPONSIBILITIES FOR EACH SERVICE:

- 1) NOTICE: CUSTOMER MUST ENSURE THAT ALL JOB CONDITIONS CONFORM TO ALL OSHA REGULATIONS AND REQUIREMENTS
- 2) WARNING: AFTER COMPLETION OF ANY VALVE INSERTION OR WET TAP SERVICE, CUSTOMER CANNOT PERFORM A STATIC TEST AGAINST THE VALVE INSERTION OR TAPPING VALVE.
- 3) WE RECOMMEND A CONCRETE THRUST BLOCKING TO BE POURED UNDER AND BEHIND WET TAP AND/OR POURED UNDER THE VALVE INSERTION AFTER INSTALLATION
- 4) LINE STOP SERVICES OFFER A "WORKABLE" SHUTDOWN. PRO TAPPING, INC. DOES NOT GUARANTEE THAT SETTING THE PLUG INTO THE LINE THE FIRST TIME WILL PROVIDE A "WORKABLE" SHUTDOWN. ANY ACTIONS TAKEN TO IMPROVE ON THAT ARE NOT TO BE CONSIDERED A DELAY OF WORK ON SITE. ALSO, BECAUSE OF POSSIBLE INTERNAL CORROSION AND DEPOSITS IN MAINS A "BOTTLE TIGHT" SHUTDOWN IS NOT ALWAYS ANTICIPATED. A SATISFACTORY SHUTDOWN SHALL ALLOW THE CONTRACTOR/OWNER TO ACCOMPLISH THEIR WORK (I.E. VALVE REPLACEMENT ETC.) USING ALTERNATIVE METHODS TO CONTROL ANY LEAK.
- 5) AIR - PORTABLE AIR COMPRESSOR 100 CFM @ 100 PSI (BIG ENOUGH TO RUN A SINGLE JACK HAMMER) 3/4" AIR HOSE WITH CHICAGO COUPLINGS
- 6) ELECTRIC - STANDARD 110 VOLT WITH EXTENSION CORD
- 7) GENERATOR EQUIVALENT TO 4,000 WATTS (110 VOLT, 20 AMP) TO POWER OUR ELECTRIC DRIVE
- 8) LIFTING SERVICES - CRANE, CHERRY PICKER OR BACK HOE
- 9) EXCAVATION REQUIREMENTS: 6 ft. x 7 ft.
- 10) 6 ft. OF CLEAR PIPE WITH NO HUBS, BELLS OR JOINTS
- 11) 2 ft. UNDER THE MAIN _____ ft. BEHIND THE MAIN WITH 6 in. OF STONE
- 12) 3 ft. ON EACH SIDE OF THE MAIN
- 13) MAXIMUM WORKING PRESSURE ALLOWED ON THE MAIN DURING THE VALVE INSERTION/LINE STOP IS 95 #
- 14) MAXIMUM FLOW RATE ALLOWED ON THE MAIN DURING THE LINE STOP IS MAX 3 FPS ft. PER SECOND
- 15) WOOD THRUST BLOCKING FOR PIPELINE AND EQUIPMENT
- 16) CONCRETE THRUST BLOCKING AND PIPE CLAMP RESTRAINTS FOR LINE STOP FITTINGS
- 17) BLOW DOWN AND EQUALIZATION OF PIPE LINE FOR LINE STOP - SIZE _____ QUANTITIES _____
- 18) PUMP FOR DEWATERING, SHEETING AND BARRICADES IF NEEDED
- 19) 2+ LOCAL CRAFT LABORS TO ASSIST WITH ALL EQUIPMENT AND MATERIALS
- 20) EXACT OD AND WORKING PRESSURE OF PIPELINE MUST BE VERIFIED IN WRITING BEFORE ORDERING ANY SAID MATERIALS AND/OR SERVICES
- 21) CUSTOMER TO SUPPLY WATER FOR TESTING OF MATERIALS
- 22) SUCK TRUCK ON SITE TO COLLECT SEWER/SHAVINGS FROM FLUSHING OF VALVE INSERTION

PRO TAPPING TO PROVIDE:

HYDROSTATIC TESTING REQUIRED: YES NO

AIR COMPRESSION RENTAL: YES NO

INITIAL _____

JOB START DATE: _____
JOB END DATE: _____
JOB START TIME: _____
OT: _____

JOB SITE CONTACT: _____
CUSTOMER P.O.: _____
PRO TAP'S JOB #: _____

The price quoted is based on 10* _____. If we are delayed by the actions or omissions of the customer or a third party, causing us to spend time on the job beyond the said hours/days, our rate for the extra time will be \$ 650.00 per hour. The per hour rate is for person(s) and/or equipment on the job being used or on stand by for the above referenced project, and applies to extra time for loading and breakdown, travel, and re-mobilization. Due to the mobilization and related expenses, Pro Tapping, Inc. will not reduce its contract/invoice amount in the event that the work is completed in less time than stated.

Should the job be cancelled or rescheduled without ____ business days notice there will be a fee of \$____ to cover job related setup. Costs related to ordering of any special order materials will be billed in full.

Prior to the commencement of any work by Pro Tapping, Inc., customer shall notify Pro Tapping, Inc., in writing, of any condition that may cause damage to any equipment or supplies of Pro Tapping, Inc. Therefore, in the event that any equipment or supplies or any part or portion thereof of Pro Tapping, Inc. are destroyed during or as a result of services performed by Pro Tapping, Inc., customer shall, within 10 days of written notice of such damage or destruction, reimburse Pro Tapping, Inc. for all such damage. "Equipment" as used in this paragraph includes pilot drills, cutters and etc.

In no event shall Pro Tapping, Inc. be liable for any incidental or consequential damages. This exclusion applies regardless of whether such damages are sought based on breach of warranty, breach of contract, negligence, strict liability in tort or any other legal theory. NOTE: Due to the nature of Pro Tapping's service, the coupon cannot be guaranteed.

This quote does not include tax on the entire project, such as "nonresident" tax. If your company is tax exempt, we do require a tax exempt certificate with your payment. Customer shall be responsible for any materials ordered, even if the order is cancelled. There will be no deductions for less than stated hour(s) per day. Payment for services and materials are due on site or net 30 days upon approval of credit application (no retainage allowed). 1.5% service charge charged per month on unpaid balances. If there is a breach of this contract by the Purchaser, the Purchaser shall be responsible for payment of any and all attorney's fees incurred by Pro Tapping, Inc. These attorney's fees shall also be subject to 1.5% service charge per month. The job ticket, when signed by the customer, will be deemed to constitute an acceptance of the services and/or materials supplied by Pro Tapping, Inc. hereunder, and will be deemed binding between the parties. This Contract shall be governed by the laws of the State of New Jersey. Any actions, claims or suits arising out of or relating to this Contract, or the breach of this Contract, shall be brought only in, (and the parties consent) to the jurisdiction of the Courts of the State of New Jersey. Notwithstanding the foregoing, all claims, disputes, and other matters in question arising out of, or relating to this Contract, or the breach of this Contract, shall, at the sole election of Pro Tapping, Inc., be decided by binding arbitration conducted in Burlington County, New Jersey, in accordance with the Construction Industry Arbitration Rules of the American Arbitration Association. In the event of any arbitration proceedings, the prevailing party shall be entitled to recover its attorney's fees and arbitration costs. A judgement thereon may be entered and enforced in any court of competent jurisdiction.

ADDITIONAL INFORMATION OR COMMENTS:

* DAY 1: (2) HOURS TO INSTALL FITTING
DAY 2: (8) HOURS TO TAP, SET STOP, HOLD FOR CUSTOMER'S WORK & COMPLETE

I HEREBY AGREE & ACCEPT THE ABOVE:

NAME: _____ SIGNATURE: _____ DATE: _____

ED KUCK EXCAVATING, INC.

20 Day Road
Carmel, New York 10512
845-225-2400

June 13, 2019

Town of Carmel
Attn: Mr. Richard Franzetti
60 McAlpin Avenue
Mahopac, NY 10541

Job Location: 301 and Fowler Avenue, Carmel, NY

Job Description:

- Traffic control
- Saw cut road
- Excavate and expose 8 inch water main – hole to be approximately 5 ft. X 7ft.
- Haul away spoiled fill
- Steel plate road

- Remove steel plates for line stop to be performed by others
- Upon completion of line stop backfill hole with Item 4 and compact
- Followed by restoration of disturbed asphalt surface

Estimate for above: \$6,000.00- \$8,000.00

From: [Esteves, Donna](#)
To: [Franzetti, Richard](#)
Subject: RE: 06-18-19 - CWD 2 Tap
Date: Tuesday, June 18, 2019 12:00:43 PM

Yes, there are sufficient funds in the operating budget for this expense.

Donna Esteves

Town of Carmel ~ Engineering Department
60 Mc Alpin Ave
Mahopac, NY 10541
845-628-1500 ext. 184

From: Franzetti, Richard
Sent: Tuesday, June 18, 2019 11:51 AM
To: Esteves, Donna
Subject: 06-18-19 - CWD 2 Tap

Donna

Are these sufficient funds in the CWD 2 budget for this expense:
Pro tap/Kuck – \$7,522 + \$8,000 = \$15,522

Richard J. Franzetti. P.E, BCEE
Town Engineer
60 McAlpin Avenue
Mahopac, New York 10541
Phone - (845) 628-1500 ext 181
Fax – (845) 628-7085
Cell – (914) 843-4704
rjf@ci.carmel.ny.us

This communication may be confidential and is intended for the sole use of the addressee(s). No use or reproduction of the information provided is permitted without the written consent of the Town of Carmel. If you are not the intended recipient, you should not copy, disclose or take any action in reliance on this communication. If you have received this communication in error, please notify the sender by reply e-mail and delete the message and any attached documents.

TOWN OF CARMEL HIGHWAY DEPARTMENT

Carmel Highway Department
55 McAlpin Avenue
Mahopac, NY 10541

MICHAEL SIMONE
Superintendent of Highways

845.628.7474
FAX 845.628.1471
MSimone@bestweb.net

FROM THE DESK OF: *Michael Simone* 

TO: SUPERVISOR KENNETH SCHMITT
TOWN BOARD

DATE: JUNE 24, 2019

RE: EMERGENCY PURCHASE REQUEST

I am requesting immediate authorization of purchase as follows:

VENDOR	Ben Funk, Inc	# 0485
---------------	---------------	--------

AMOUNT	\$ 12,380.89
---------------	--------------

REASON FOR PURCHASE	Motor Job – Truck #33
----------------------------	-----------------------

SEE ATTACHED – 3 written quotes

This vehicle is un-assembled and on a lift in the garage: therefore, these parts are needed ASAP

cc Comptroller MaryAnn Maxwell

Town of Carmel Highway Department

QUOTES

Procurement Policy for Purchases:

- \$1,000.00 - \$4,999.00 -- 3 Verbal Estimates
- \$5,000.00 - \$9,999.00 -- 3 Written Estimates
- \$>\$4,999.00 -- 3 Written Quotes AND Town Board Resolution

DATE: 6-21-2019

PRODUCT: #33 motor job

	<u>VENDORS CONTACTED</u>	<u>COST</u>
1.	Vendor: <u>Ben Funk, INC</u> Contact: _____ Address: <u>3609 Rout 9 Hudson N.Y. 12534</u> Phone: <u>1-518-851-8581</u>	<u>\$ 12,380.89</u>
2.	Vendor: <u>Hine Bros. Inc</u> Contact: <u>John</u> Address: <u>P.O. Box 206, 67 Main St. Southbury Conn</u> Phone: <u>203-336-5387</u>	<u>\$ 12,413.59</u>
3.	Vendor: <u>Arkel Motors</u> Contact: <u>Mark</u> Address: <u>70 Windsor Hwy. New Windsor, NY 12553</u> Phone: <u>562-0591</u>	<u>\$ 15,140.40</u>

RESEARCH BY: Shawn Spock

*** Parts price quote for Customer #365 ***

BEN FUNK, INC.

3609 ROUTE 9
HUDSON, NY 12534

Quoted To:

TOWN OF CARMEL HWY DEPT.
ATTN: SHAWN
60 MCALPIN AVENUE
MAHOPAC NY 10541

Phone
Home: 845 628-7499
Work: 845 628-1471 Fax

Quote #: **T505965**
PO #:
Customer #: **365**
Date: **06/14/19**
Initials: **JH**

Part Number	Description	Bin	List Price	Qty @ Price	Tax	Amount
1881727C93/	KIT, FRONT COVER FRONT	W1E	2,208.65	1.00 @ \$1,452.82 EA	05	\$ 1,452.82
1894239C92/	KIT CAMSHAFT	W4D	2,054.54	1.00 @ \$1,310.17 EA	05	\$ 1,310.17
1841365C3/	BOLT	1210810B	13.57	5.00 @ \$8.92 EA	05	\$ 44.60
7094780C1/	BOLT W/STUD	1210810B	33.94	5.00 @ \$22.33 EA	05	\$ 111.65
1870574C92/	MANIFOLD	NONSTOCK	1,022.99	1.00 @ \$672.91 EA	05	\$ 672.91
7090595C91/	KIT, EGR COOLER ASSY	W5F	2,263.23	1.00 @ \$1,488.73 EA	05	\$ 1,488.73
7090595C91/	(CORE CHARGE)			1.00 @ \$300.00	05	\$ 300.00
5010874R92/	KIT EGRC,KIT, REMAN EGR COOL	W5F	1,891.28	1.00 @ \$1,244.06 EA	05	\$ 1,244.06
5010874R92	(CORE CHARGE)			1.00 @ \$300.00	05	\$ 300.00
1889245C96	HEAD GASKET SET	WL1H	538.45	1.00 @ \$354.18 EA	05	\$ 354.18
5010823R91	INJECTOR, ASSY REMAN DT570 I	injbin	538.91	6.00 @ \$300.71 EA	05	\$ 2,344.26
5010823R91	(CORE CHARGE)			6.00 @ \$90.00	05	\$ 540.00
HOR99A4700	DRIVE	W6E	1,359.90	1.00 @ \$1,086.09 EA	05	\$ 1,086.09
1891415C94	COVER	new	1,720.04	1.00 @ \$1,131.42 EA	05	\$ 1,131.42

Subtotal \$ 12,380.89
Sales Tax \$ 0.00
Total \$ 12,380.89

pound sign preceding a part number indicates the part is a non-stock part

* an asterisk next to the tax code indicates tax was calculated on the item



HINE BROS. INC.
 P.O. BOX 406 · 67 MAIN ST. SOUTH
 SOUTHURY, CT 06488-0406
 203-264-8251

NO RETURNS WITHOUT INVOICE OR # OF INVOICE.
NO EXCEPTIONS. NO RETURNS ON ANY EMERGENCY ORDER
20% HANDLING ON ITEMS RETURNED AFTER 24 HOURS.
DEPOSIT REQUIRED ON ALL SPECIAL ORDERS.
NO RETURN ON CORES AFTER 30 DAYS.

HINE BROS. INTERNATIONAL

1001 WORDIN AVE.
 BRIDGEPORT, CT 06605
 203-336-3387

THE SELLER HEREBY EXPRESSLY DISCLAIMS ALL WARRANTIES, EITHER EXPRESS OR IMPLIED, INCLUDING ALL IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR THE PARTICULAR PURPOSE, AND THE SELLER NEITHER ASSUMES NOR AUTHORIZES ANY OTHER PERSON TO ACCUME FOR IT ANY LIABILITY IN CONNECTION WITH THE SALE OF THESE PARTS.

DATE ENTERED 19 JUN 19	YOUR ORDER NO. QUOTE	DATE SHIPPED 20 JUN 19	INVOICE DATE	INVOICE NUMBER C103268
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**** I N V O I C E Q U O T E - DO NOT PAY ****

PAGE 1 OF 2

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ACCOUNT NO. 6287474

TOWN OF CARMEL HIGHWAY DEPT
 55 MCALPIN AVE
 MAHOPAC, NY 10541

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SHIP VIA		SLSM.	B/L NO.	TERMS		F.O.B.		
		10917		CHARGE		SOUTHURY CT		
ORD.	SHIP	B.O.	PART NUMBER	BIN	DESCRIPTION	LIST	NET	AMOUNT
1	1	0	1881727C93	W05	COVER, KIT	2208.65	1452.82	1,452.82
1	1	0	1841365C3	A20	BOLT PREV	13.57	8.92	8.92
1	1	0	7090595C91	W09	COOLER, KIT	2253.23	1488.73	1,488.73
					CORE DEPOSIT		300.00	300.00
1	1	0	5010874R92	W09	COOLER, KIT	1891.28	1244.06	1,244.06
					CORE DEPOSIT		300.00	300.00
1	1	0	1889245C96	U0B	GASKET, KIT	538.45	354.18	354.18
1	1	0	1891415C94	W05	COVER, ASS	1720.04	1131.42	1,131.42
1	1	0	1894239C92		BEARING, KI	2054.54	1310.17	1,310.17
1	1	0	7094780C1		STUD, PREV	33.94	22.33	22.33
1	1	0	1870574C92		MANTFOLD A	1022.99	672.91	672.91
1	1	0	HOR99A47C0		DRIVE FAN	1359.90	1118.79	1,118.79
1	1	0	5010823R91		INJECTOR,	538.91	390.71	390.71
						PARTS		
						SUBLET		
						FREIGHT		
						SALES TAX		
						TOTAL		

44.60

111.65

x6 = 2344.26
 + 540.00 core

Copyright 2000 ADP, Inc.

CUSTOMER COPY

CUSTOMER S/G

COPY

HINE BROS. INC.
 P.O. BOX 406 · 67 MAIN ST. SOUTH
 SOUTHURY, CT 06488-0406
 203-264-8251

X

NO

1,452.820+
 44.600+
 1,488.730+
 300.000+
 1,244.060+
 300.000+
 354.180+
 1,131.420+
 1,310.170+
 111.650+
 672.910+
 1,118.790+
 2,344.260+
 540.000+
12,413.590*



ARKEL MOTORS



70 WINDSOR HWY, NEW WINDSOR, NY 12553
PHONE: (845) 562-0532 · FAX: 562-3845
parts@arkelmotors.com

SERVICE
(845) 562-0650
REPAIR SHOP # R-2360012

PARTS
(845) 562-0691
(845) 562-0695

SALES
(845) 562-0532
(845) 562-0533



NO RETURNS ON ELECTRICAL OR SPECIAL ORDER PARTS.
15% RESTOCKING CHARGE APPLIED ON ALL MERCHANDISE RETURNED FOR CREDIT OR REFUND.
NO RETURNS AFTER 10 DAYS OR WITHOUT THIS INVOICE.

DISCLAIMER OF WARRANTIES

Any warranties on the product sold hereby are those made by the manufacturer. The seller hereby expressly disclaims all warranties, either express or implied, including any implied warranty of merchantability or fitness for a particular purpose, and the seller neither assumes nor authorizes any other person to assume for it any liability in connection with the sale of said products. Any limitation contained herein does not apply where prohibited by law.

DATE ENTERED	YOUR ORDER NO.	DATE SHIPPED	INVOICE DATE	INVOICE NUMBER
14 JUN 19		14 JUN 19		Q27517

****QUOTE****

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ACCOUNT NO. 1017

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PAGE 1 OF 1

TOWN OF CARMEL HIGHWAY
55 MCALPIN AVE
MAHOPAC, NY 10541

TOWN OF CARMEL HIGHWAY
55 MCALPIN AVE
MAHOPAC, NY 10541

SHIP VIA	SLSM.	B/L NO.	TERMS	F.O.B. POINT
	558		CHARGE	NEW WINDSOR, NY

QTY	UNIT	PART NO.	DESCRIPTION	LIST	NET	AMOUNT
1	0	1881727C93	COVER, KIT	2208.65	1864.68	1,864.68
1	0	1894239C92	BEARING, KI	2054.54	1691.01	1,691.01
1	0	1841365C3	72I BOLT PREV	13.57	11.45	11.45
1	0	7094780C1	50E STUD, PREV	33.94	28.65	28.65
1	0	7090595C91	61W COOLER, KIT	2263.23	1910.76	1,910.76
			CORE DEPOSIT		300.00	300.00
1	0	5010874R92	80E COOLER, KIT	1891.28	1596.74	1,596.74
			CORE DEPOSIT		300.00	300.00
1	0	1889245C96	62F GASKET, KIT	538.45	454.59	454.59
6	0	5010823R91	77A INJECTOR,	538.91	465.45	2,792.70
			CORE DEPOSIT		90.00	540.00
3	0	HCR99A4700	162C DRIVE, FAN	1359.90	1333.99	1,333.99
1	0	1891415C94	161SIDE COVER, ASS	1720.04	1452.17	1,452.17
1	0	1870574C92	149B MANIFOLD A	1022.99	863.68	863.68

**** I N V O I C E Q U O T E - D O N O T P A Y ****

Did All For Qty of 1 Except Int.

Thank You!

We

Appreciate Your Business!

WE DELIVER
NOW OPEN SAT FROM 8 AM TIL 12 NOON
7:00 AM - 7:00 PM MONDAY- THUR
7:00 AM - 6:00 PM FRIDAY

PARTS	15,140.42
SUBLET	
FREIGHT	0.00
SALES TAX	0.00
TOTAL	\$15,140.42

CUSTOMER'S SIGNATURE
X

William A. Shilling, Jr., P.C.

Attorney at Law

122 Old Route 6

Carmel, New York 10512

E-Mail: waslaw@shillinglegal.com

Frank J. Smith III

**Also Admitted in CT*

Phone (845) 225-7500

Fax (845) 225-5692

June 18, 2019

Town of Carmel Town Hall
Attn: Anne Pasquerello
60 McAlpin Avenue
Mahopac, New York 10541

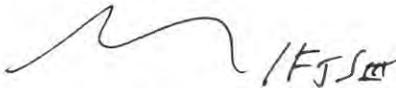
RE: Centennial Golf Club of New York

Dear Anne,

Please find attached to this letter a revised Verified Petition for Zone Change and Statement of Facts related to the April 30, 2019 submission made by Centennial Golf Club of New York. After submission, it was brought to our attention that the relevant attachments were not enclosed with the letter.

Please advise as to the soonest possible date this matter may be placed on the Town Board Agenda. Upon receipt of this revised copy, if you have any questions, please do not hesitate to contact me at (845) 225-7500.

Very truly yours,



William A. Shilling, Jr., Esq.

WAS:fjsIII

CC: Greg Folchetti, Esq.
Rose Trombetta





TOWN BOARD
TOWN OF CARMEL: COUNTY OF PUTNAM
-----X

In the Matter of the Petition of

CENTENNIAL GOLF CLUB
OF NEW YORK, LLC

**VERIFIED PETITION FOR
CHANGE OF ZONING**

Petitioners,

For a Change of Zoning for Parcels of Real
Property
-----X

Petitioners, Centennial Golf Club of New York, LLC, by David Leibowits, member,
(hereinafter "Petitioners") respectfully submit as follows:

1. Petitioners are the owner of certain property located at Town of Carmel, County of Putnam and State of New York.
2. The Tax Map numbers are 44.-2-4, 44.-2-2 and 44.-2-3.
3. The subject premises are located within both the Carmel Central School District and Brewster School District.
4. The Petitioners request that the Zoning Code of the Town of Carmel, be amended, and the Zoning Map of the Town of Carmel be reclassified and change the zone of the subject premises from a Residential District (3 acres) to a its former classification which was Residential (1 acre).
5. The Petitioners hereby declare, for the purpose of reliance thereon by the Town of Carmel, that the full particulars of the Petitioners' proposed use of the subject premises for the next five (5) years, if this change of zone is granted, are as follows:
 - a. Cluster development containing 96 residential units (attached).

6. The site plan is being processed and will be presented to the Town of Carmel Planning Board for referral.

7. Economics of the declining golf course requires this action and is the only means to keep the remaining portion of the golf course (18 holes) open to the public at large, and forever green in the Town of Carmel and Town of Southeast.

8. The proposed change of zone will be beneficial to the public of the Town of Carmel because it is seeking to develop the property in the spirit of the Greenway Connection as adopted by §156-90 of the Town of Carmel Code:

a. Petitioner is open to conditions offered by the Town to keep the remaining 18-hole golf course and to preserve the remainder of the undeveloped parcel, in keeping with the Town of Carmel's adopted Greenway Compact Program;

b. The proposed change will further benefit the Town of Carmel to create needed single family development to a school district with a documented declining population (see attached); and

c. Increased tax revenues to be received by Town.

9. The proposed change of zone will not be detrimental to the other residential properties in the adjoining neighborhood because the cluster development will result in the residential development being in the general proximity of Fair Street, leaving the area adjoining Kelly Ridge green and undisturbed, due to the cluster.

10. The parcels were previously zoned 1 acre at the time of Petitioner's purchase. Further, the property has been assessed from inception by paying charges to the Town of Carmel for the municipal sewer system on the basis of 162 units (see attached) and over \$3 million in sewer capital charges alone.

11. Currently, only commercial golf course and related purposes use the parcel. There are no non-conforming uses or structures on the subject premises.

12. The subject premises are located within 500 feet of the town line of the Town of Carmel. The remaining golf course use after the zoning is changed are located within the Town of Carmel and Town of Southeast.

13. The subject premises are not within 500 feet of any existing or proposed County or State Park or other recreation area except the existing golf course.

14. The subject premises are not located within 500 feet of any right-of-way of any existing or proposed County or State parkway, thruway, expressway, road or highway.

15. Upon information and belief, the subject premises are not located within 500 feet of any existing or proposed right-of-way of any stream or drainage channel owned by the County or for which the County has established channel rights.

16. The subject premises are not located within 500 feet from the existing or proposed boundary of any County or State-owned land on which a public building or institution is situated.

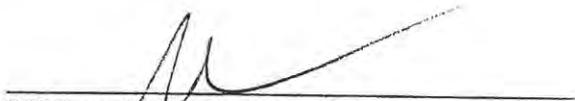
17. The proposed zone change does not affect property within the protectively zoned area of a housing project authorized under the Public Housing Law.

18. The Petitioners hereby consent to Board action reverting the subject premises to a zoning classification similar to its present zoning classification if the Town Board subsequently determines that any statement contained in this Petition or any statement made by the Petitioners at the public hearing is found to be materially false and was not made in good faith. The petitioner further consents to Board action reverting the subject premises to a zoning classification similar to its present zoning classification in the event that the Petitioners fail to abide by any conditions or restrictions contained herein or imposed hereafter by the Town Board.

19. Petitioners waive any or all rights otherwise afforded to them under provisions of the Zoning Code of the Town of Carmel upon the granting of the change of zone requested herein.

WHEREFORE, Petitioners Centennial Golf Club of New York, LLC, by David Leibowitz, member respectfully request that the Town Board of the Town of Carmel consider, review, and effectuate the requested change of zoning set forth herein.

Dated: Carmel, New York
April 30, 2019



William A. Shilling, Jr., Esq.
William A. Shilling, Jr., P.C.
Attorneys for Petitioners
122 Old Route 6
Carmel, New York 10512
(845) 225-7500

VERIFICATION

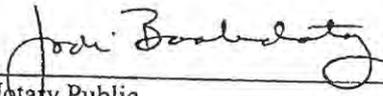
STATE OF NEW YORK)
) ss.:
COUNTY OF PUTNAM)

David Leibowits, being duly sworn, deposes and says:

I am one of the Petitioners herein. I have read the annexed Petition, know the contents thereof, and the same is true to my knowledge, except those matters that are stated to be alleged upon information and belief, and as to those matters, I believe them to be true upon my own investigation and knowledge.


David Leibowits

Sworn to before me this
30 day of April, 2019.


Notary Public

JODI ROBIN BAABDATY
NOTARY PUBLIC
State of Connecticut
My Commission Expires Nov. 30, 2023

TOWN BOARD
TOWN OF CARMEL: COUNTY OF PUTNAM
-----X

In the Matter of the Petition of

CENTENNIAL GOLF CLUB
OF NEW YORK, LLC

Petitioners,

For a Change of Zoning for Parcels of Real
Property
-----X

I

STATEMENT OF FACTS

The applicant purchased the subject property in 1996. Peter and David Leibowits created a 27-hole golf course in the Town of Carmel and the Town of Southeast in 1997-1998. It was created at a time when golf outings and banquets were in great demand. The twenty-seven holes made the acceptance of these functions possible while still keeping the golf course open to the general public.

The site has also become a venue for Town of Carmel groups for entertaining many social functions in the detached banquet room, often unrelated to golf.

At the time of the applicant's purchase, the zoning was R-1 which involved an entitlement to develop on one-acre parcels. The septic count was approved for 162 units which is an ongoing expense borne by applicant. Over the years, the applicant has paid over three million dollars in sewer capital charges alone.

The record is clear that the rate of golf course construction grew dramatically in the 1990's. However, the number of golfers slowly subsided and golf courses have increasingly been less profitable, leading to golf course owners under pressure to sell their land for more profitable uses.

Thus, applicant has incurred similar difficulties outlined herein. It is thus a necessary alternative being considered to re-develop the land residentially to sustain.

Golf courses are generally viewed by community residents as providing important areas of open space and recreation opportunities to the public at large. Conversely, neighboring land owners often oppose the prospect of housing complexes replacing the pastoral views created by golf courses. It is also fundamental that golf course re-development presents an opportunity for the municipality to negotiate desired community benefits.

The zone change proposed by the applicant will inure to the Town's benefit for several reasons. It will create needed residential single-family development to a community with declining school populations. It will create additional tax revenues for the Town of Carmel. Most importantly, the owner is aware of the planning initiatives outlined, and adopted by the Town, in the Greenway Compact Program, and is open-minded to conditions offered by the Town to restrict development and preserve open space. It is fundamental that the preservation of green and recreational space is a stated desired Town goal codified in §156-90.

II

Preservation of Open Space and Recreation Areas are a Legitimate Governmental Interest

As municipalities progress and adapt to changing environments and demographics, it must adopt new tools in order to develop stated goals and priorities. "Smart Growth" is often cited as a technique that offers towns and villages a way to attract new residents while providing and protecting green space and recreation areas to residents.

Smart growth is "sensible, planned growth that integrates economic development and job creation with community quality-of-life by preserving the built and natural environments." Smart growth has many advantages in boosting economic development while also prioritizing open space

and recreation opportunities. Benefits of smart growth expand beyond economic opportunities as well. Its use enhances environmental conditions, allows for calculated development, and makes communities more attractive to live in.

A central facet of smart growth is the use of cluster and conditional zoning in order to allow for development while simultaneously preserving open space. By utilizing these strategies, municipalities reap the rewards of development while ensuring that their green spaces will stay intact.

The Town of Carmel has indicated a desire to use smart growth by implementing §156-90 of the Town Code. The concepts expressed in the Greenway Connections report is directly on point with the desire to develop the subject premises. By reducing the required lot size and allowing for cluster development, the Town would be serving the goals of developing intelligently without changing the essential character of the community, and while ensuring open space and recreation.

The Greenway Connections report for Putnam County, titled, "Putnam County Pathways: A Greenway Planning Program Linking Putnam's Open Space, Historic, Cultural and Economic Resources," speaks directly to the desire to retain open space. One planning principle in the report is "Enhance the quality of life for Putnam County residents, residents of the Hudson River Valley and Hudson Highlands through intelligent stewardship of Putnam's land and water resources through sound planning, development, transportation and conservation policies." By allowing a smaller lot size requirement, the Town is enacting this goal since a significant portion of green space will be preserved as opposed to being developed.

A second planning principle is to, "Support and encourage the development of land use plans that present balanced growth policies where development is appropriately sited, housing is

affordable, watersheds are respected, historical assets are valued, natural resources and open space are protected, and recreational and cultural opportunities are diverse and numerous". This development falls squarely in line with these principles. This development would create a harmonious use of "built" and "non-built environments."

By implementing §156-90, the Town of Carmel has expressed a desire to implement more modern and flexible zoning and land use tools. This project seeks to utilize them. The requested relief would allow for attractive development while ensuring over 120 acres of space remains open and undevelopable.

III

Legal Justification for the Use of Conditional Zoning

The concept of "conditional zoning," whereby open space and recreational venues are preserved in exchange for favorable conditions to applicant, is fundamental in New York Law.

The traditional idea of zoning is that provisions alone burden and limit land uses. In certain circumstances legislative and land use boards will approve projects but permit favorable conditions to an applicant where recreation or open space concerns can be protected and preserved.

The entitlement for conditional zoning is found in the landmark case of *Church v. Town of Islip*, 8 NY 2d 254, where the Court upheld rezoning of a property subject to conditions. In that case, conditions to restrict the maximum size of buildings and other restrictions were in response to community needs. The Court stated the power to rezone includes the power to add new restrictions when particular circumstances require.

The Court stated "it is understandable that in the public interest and in the interest of protracted expediency the practice of granting zoning changes and conditioning their uses by means of privately imposed restrictive covenants has seemingly become widespread."

Furthermore, the Court stated “We are not of the opinion that such practice is contrary to the spirit of zoning ordinance and is beyond the statutory power of local legislative bodies” (emphasis supplied).

In *Matter of Citizens v. Common Council of City of Albany*, 56 AD 3d 1060, the Court changed its zoning from a commercial office district to a highway commercial district. The Court ruled that the action did not constitute “spot zoning” because it was part of a thoroughly considered plan calculated to best serve the community and the approved use was not totally different than that of the surrounding area.

Significantly, it has been held that “Any such legislative action is entitled to the strongest presumption of validity and will stand if there is a factual basis” (*Shepherd v. Village of Skaneateles*, 30 NY 115; *Wiggins v. Town of Somers*, 4 NY 2d 215). Further, it is well established that Courts are reluctant to overturn zoning amendments when it is well designed and passed after careful consideration (*In the Matter of Save our Forests Action Coalition v. City of Kingston*).

Furthermore, New York State Comptroller Opinion No. 79-698 supports the validity of conditional zoning. This opinion confirms the notion that, “a town board may impose reasonable conditions for the protection of neighboring property owners.”

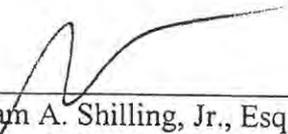
Conditional zoning, specifically related to golf courses, has been utilized across New York State. Locally, the Silo Ridge project in Amenia, New York utilized conditional zoning to allow for development while preserving open space. Of the project’s 670-acre footprint, 80 percent will be preserved as open space. Deed restrictions have been utilized in many instances to provide town boards with an assurance that the remaining undeveloped property would persist as open or recreational space. It is important to consider the developmental alternative to conditional zoning. Instead of preserving open space and recreation, sprawling fields and meadows would be

developed into residential units that are permitted as of right. (*\$500 Million Silo Ridge Project Breaks Ground*, The Poughkeepsie Journal, March 9, 2016)

The concept of conditional zoning has been affirmed not only in *Church*, but also in *Allison C. Collard v. Incorporated Village of Flower Hill* (52 N.Y.2d 594). In contrast, the concept of contractual zoning has been denied in *Madeline Levine v. Town of Oyster Bay* (26 A.D.2d 583). In conclusion, the use of conditional zoning offers municipalities the best of both worlds: the ability to preserve open and recreational space while simultaneously developing intelligently, boosting tax revenue, and offering much needed real estate inventory to bolster school district rolls.

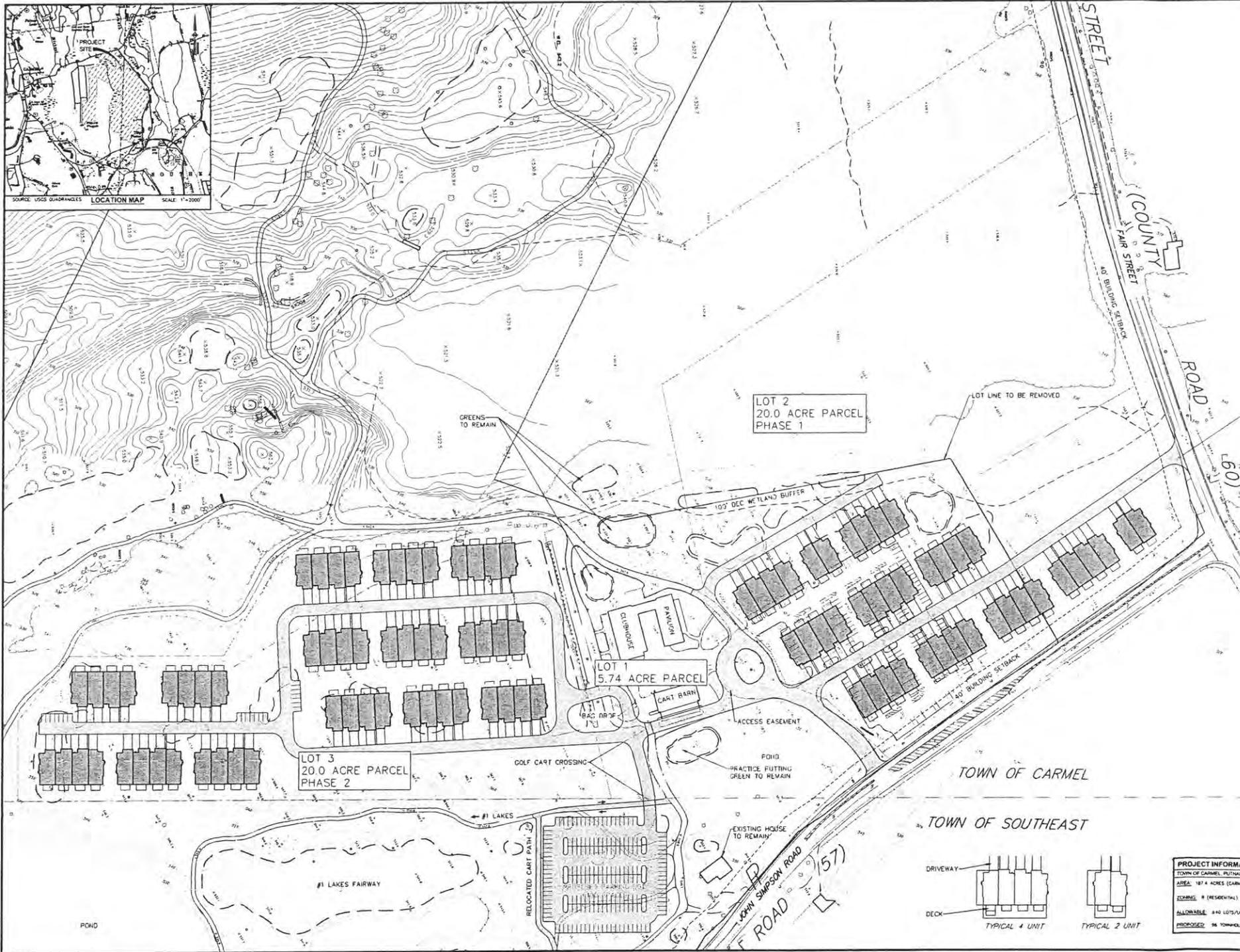
WHEREFORE, we respectfully request that this application be in all respects granted and/or for such other and further relief as the Board deems appropriate.

Dated: Carmel, New York
April 30, 2019



William A. Shilling, Jr., Esq.
William A. Shilling, Jr., P.C.
Attorneys for Petitioners
122 Old Route 6
Carmel, New York 10512
(845) 225-7500

Exhibit A



SOURCE: USGS QUADRANGLES LOCATION MAP SCALE: 1"=2000'

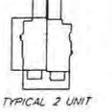
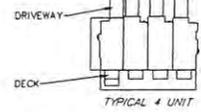
LOT 2
20.0 ACRE PARCEL
PHASE 1

LOT 1
5.74 ACRE PARCEL

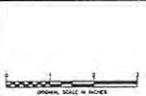
LOT 3
20.0 ACRE PARCEL
PHASE 2

TOWN OF CARMEL

TOWN OF SOUTHEAST



PROJECT INFORMATION	
TOWN OF CARMEL, PUTNAM COUNTY, NEW YORK	
AREA: 187.4 ACRES (GAIN)	
ZONING: R (RESIDENTIAL)	
ALLOWABLE: 840 LOTS/AC	
PROPOSED: 96 TOWNHOMES	



CHAZEN ENGINEERING, LAND SURVEYING
 CHAZEN COMPANIES
 1000 ROUTE 9W, SUITE 200
 PUTNAM COUNTY, NEW YORK 12572
 PHONE: (518) 537-1000
 FAX: (518) 537-1001
 WWW: WWW.CHAZEN.COM

LANDSCAPE ARCHITECTURE, CO., D.P.C.
 1000 ROUTE 9W, SUITE 200
 PUTNAM COUNTY, NEW YORK 12572
 PHONE: (518) 537-1000
 FAX: (518) 537-1001
 WWW: WWW.CHAZEN.COM

CENTRAL GOLF CLUB
CONCEPT LAYOUT
 TOWN OF CARMEL, PUTNAM COUNTY, NEW YORK

DATE	DESCRIPTION

DATE: 10/15/2008
 DRAWN BY: J. SMITH
 CHECKED BY: J. SMITH
 SCALE: AS SHOWN

Exhibit B

(Please see pages 9 through 12)



MEMORANDUM

To: Chairman Gary & Members of the Planning Board
From: Patrick Cleary, AICP, CEP, PP, LEED AP
Date: November 11, 2018
Re: Multi-Family Housing Zoning

1.0 INTRODUCTION

In 2002 the Town of Carmel amended the Zoning for the Town by replacing its traditional hierarchy of multiple residential zoning districts (R-60, R-60/40, R-40/30, R-40/20, R-40/10, R-MF, R-MFA)¹ with a single 3-acre single family district as the Town's only residential zone. It was anticipated that up-zoning would reduce development pressures, including concerns over increases in school district enrollments, by slowing home building as fewer parcels would be available for development, which would correspondingly increase housing prices. The Town's action in 2002 for all practical purposes eliminated the potential for development of new market-rate multifamily housing options for the general population.

Having only one residential zone in the entire Town, which requires a minimum of 3 acres for the development of a residential dwelling unit, leaves those with more diverse needs unable to find housing within the Town. As illustrated by the data in this report, the Town of Carmel is composed of a population of varying ages and income levels. There is an unmet need to provide housing for entry level homebuyers, young people just out of college, millennials, divorcees, empty nesters who are preparing for retirement and older people who may prefer to live in a general population community rather than a designated senior housing complex. Experience has demonstrated that large lot 3-acre zoning promotes sprawl, requires more infrastructure, and creates isolated neighborhoods that rely solely on automobiles. Large lot zoning is not the most effective measure for providing environmental protection to New York City watershed lands, nor does it meet the needs of the Town's existing demographics. This "exclusionary" zoning makes the Town vulnerable to a federal fair housing

¹ Prior to 2002, in previously existing zoning districts such as R-40/10, higher density minimum lot area would apply only if public sewer and water were available.

lawsuit similar to Westchester County which affected many of its municipalities in recent years.

Currently, some limited provisions for multifamily housing exist in Town, but these are restricted to the waterfront of Lake Mahopac, which is already mostly fully developed. Multifamily Housing for the Elderly is permitted as a Special Permit Conditional use in the residential, commercial/business park and commercial zones. The conditions which need to be met in order to develop market-rate multifamily housing for the elderly include, among others, the following;

- The site must be in or contiguous to the residential zone and CBP or commercial zones.
- The site must be a minimum of 5 acres.
- The site must be served by municipal or community water and municipal or community sewer.

2.0 DEMOGRAPHIC ANALYSIS

Table 1 provides a summary of the population and housing statistics for the Town of Carmel. The Table provides a comparison of historic values from 2000 and 2010, compared to current 2018 data and provides a projection over the next 5 years to 2023.

As can be seen, according to the US Census data, the rate of growth which was approximately 14.4% over the previous decade, slowed to approximately 4% from 2000 to 2010 and has slowed to a projected 1.9% in the current decade. Projections by ESRI Demographic Forecasts indicate population growth will continue to decrease to an annual rate of one tenth of a percent. Taking a long lens look, growth of the Town was very tepid from 2000 to 2010 and has virtually stopped since 2010 which is the same time period when the impact of the Town's rezoning to exclusively large lots began to be felt.

The US Census data also indicates that during these same time periods the median age of Town residents has steadily increased from 37.1 in 2000 to 43.2 in 2018. This indicates the population is aging. Population aging is a trend that is being experienced throughout the region. In response, the Town placed an emphasis on providing housing for its Seniors. Putnam County and the Town of Carmel are aging at the fastest pace in the region. As a review of local real estate data confirms, existing homeowners are remaining in their homes and "aging in place", a likely result of the 2008 recession, and the lack of suitable housing alternatives.

The limited inventory of available housing choices has also restricted the influx of younger entry level residents. Increasing housing costs and a limited supply has

resulted in a steady decline in the ability to own a home. Steadily increasing prices make it hard for entry level homebuyers to get into the housing market. The housing market in Putnam and northern Westchester has continued to appreciate in value, putting home ownership out of reach for many entry level homebuyers.

A report was prepared by the Urban Land Institute (ULI) in conjunction with the Sierra Club and the American Institute of Architects (AIA) and the National Multi-Housing Council (NMHC), herein referred to as the ULI Study, entitled Higher Density Development Myth and Fact.² The Study provided data to refute popular myths which surround the potential development of multi-family housing. In the introduction the ULI Study states,

"New markets are emerging for real estate that offers a more convenient lifestyle than is offered by many low-density sprawling communities. New Compact Development with a mix of uses and housing types throughout the country are being embraced as a popular alternative to sprawl. At the core of the success of these developments is density, which is the key to making these communities walkable and vibrant."

Similar claims are made by ULI in their 2016 report "Emerging Trends in Real Estate® United States and Canada 2016"³, as discussed below.

As the housing market continues to sort itself out after the 2008 recession, a reasonable expectation is for the homeownership rate to settle in a narrow range around its 50-year average of 65 percent, indicating the rental and multifamily housing sectors will remain strong. This translates into the fact that housing demand will be greater across all residential segments.

Economic and demographic factors are influencing the housing market as it deals with issues around providing the type of housing desired by the baby boom generation, millennials, a population making an urban/suburban choice, and finding a way to provide housing that fits into the budgets of a changing workforce. A trend has emerged toward greater diversity in demand and supply across different sectors of the housing market.

In the Housing field, a simplistic focus on averages or medians can gravely miss key statistical points that can illuminate both opportunities and risks in the marketplace. Superior profit potential has skewed recent housing production toward the luxury end of product. What is not so obvious is that a shortfall of supply in the mid-to-lower end of the residential market is putting upward pressure on pricing for such units, exacerbating already severe budget limitations of entry-level home buyers.

² Higher-Density Development – Myth and Fact, Urban Land Institute, Sierra Club, National Multi Housing Council, American Institute of Architects, Washington D.C. 2005.

³"Emerging Trends in Real Estate® United States and Canada 2016" Urban Land Institute, 2016

The percentage of renter occupied units in Carmel has grown from 14.8 percent to 20.9 percent. The ULI study confirms this trend around the country and states "One-third of Americans rent their housing." There has also been a significant migration of young persons out of Carmel to other areas in search of rental dwelling units and entry level housing within their budget. Young persons who witnessed the housing crisis of 2008 are also demonstrating a preference for rental housing because they view the stability of the investment in a home warily, and no longer assume that single-family home ownership is a sound investment in creating a nest-egg. Moreover, the paradigm of long-term employment stability is giving way to more transient and mobile employment in the "gig economy." Being tied down to a single-family home in the suburbs, which may prove to be a bad financial investment, is no longer the typical American Dream, particularly in the New York metropolitan area.

Entry level housing on small lots and condo ownership which do not result in an over extension of household budgets, will help to mitigate the risks of homeownership for first time home buyers. This is gateway housing for the Town. The ULI study indicates that housing preferences for millennials tend toward higher density housing. "Communities are being developed using the best concept of traditional communities- smaller lots, a variety of housing types, front porches and sidewalks, shops and offices within walking distance and public transit nearby."⁴

Year	2000	2010	2018	2023
Total Population	32,997	34,305	34,935	35,290
Median Age	37.1	41.2	43.2	43.7
Number of Households	10,838	11,672	11,874	11,989
Rate of Growth	1990-2000 14.4%	2000-2010 4.0%	2010-2018 1.9%	2018-2023 1.0%
Total Housing Units	11,274	12,348	12,624	12,862
Owner Occupied Housing Units	9,160	9,668	9,227	9,467
Renter Occupied Housing Units	1,678	2,004	2,647	2,522
% Renter Occupied	14.8%	16.2%	20.9%	19.6%
Median Home Value	\$375,600	\$459,200	\$459,320	\$506,379
Average Home Value	\$430,955	\$523,015	\$523,152	\$582,465
Median Household Income	\$77,406	\$98,226	\$106,822	\$116,638
Average Household Income	\$86,467	\$114,496	\$136,133	\$157,023
Source: US Census Data, ESRI Demographic Forecasts.				

⁴ Ibid, pg. 31

Table 1 shows the Town's median age has been steadily increasing since 2000. Also shown in Table 1, the Town's rate of growth has steadily decreased from slow growth in 2000 to almost no growth since 2010. The proportion of renter occupied housing has steadily increased due in part to the fact that there isn't any new entry level housing or condominiums available for sale.

Table 2 provides a detailed breakdown of the Carmel's population by age category for the years 2010, 2018 and projection to 2023 and a further projection extrapolated out to 2028. As Table 2 shows there has been a steady aging of the population. The numbers and percentages of the 35 to 55-year-old population is consistently decreasing while the number and percentage of the 55 to 75-year-old population is projected to continue to steadily rise and almost double in a 20-year period.

It is noteworthy that the 25 to 34-year cohort has the potential for growth showing a modest increase in the percentage of the population that is represented. This cohort would include recent college graduates looking for that first career job and is very likely composed of young people who have moved back in with their parents after college in addition to other entry level homebuyers. This population specifically includes those persons in a category ripe to utilize multifamily housing, if it were available.

Without an influx of young families, the family-oriented nature of the Town of Carmel and Putnam County will inevitably change. Community priorities will shift. Recreation facilities and municipal services will need to cater to an older population not a family-oriented community. Section 4.0 below discusses the impacts this type of shift is having on the Town's school districts.

As Table 2 shows, the age categories 35 to 55 and below are losing population and all categories 55 + are continuing to grow. The projected growth in Carmel over the eighteen-year period between 2010 and 2028 is only 1,340 persons.

Age	<25	25-34	35-44	45-54	55-64	65-74	75+	Total
Number of Persons								
2010	11,141	3,109	5,090	6,390	4,339	2,458	1,805	34,305
2018	10,311	3,790	4,109	5,506	5,418	3,451	2,350	34,935
2023 (projection)	9,512	4,177	4,546	4,643	5,642	3,921	2,849	35,290
2028 (projection)	8,775	3,885	4,319	4,861	6,066	4,391	3,348	35,645
Percent								
2010	32.4%	9.1%	14.8%	18.6%	12.6%	7.1%	5.3%	100%
2018	29.6%	10.8%	11.7%	15.8%	15.5%	9.9%	6.8%	100%
2023 (projection)	26.7%	11.9%	12.9%	13.2%	16.0%	11.2%	8.0%	100%
2028 (projection)	24.6	10.9	12.1	13.6	17.1	12.3	9.4	100%
Source; US Census; ESRI Demographic Forecasts								

Table 3 provides data on the 2018 household income, broken down by age category. In every age category between age 25 and 74, the highest percentage of household incomes is \$100,000 to \$149,999, indicating that this is the household income necessary to live in the Town of Carmel. There are also high percentages of the 45-54 and 55-64 age groups where the household income is over \$200,000. There is a marked decrease in incomes after age 75 with more than 75 percent of the over 75-year-old population having annual household incomes less than \$75,000. As this segment of the population continues to rise, the economic profile of the Town will change, which has the potential to hurt the business sector in the Town for years to come.

**Table 3
Town of Carmel
2018 Household Income Profile**

Age	<25	25-34	35-44	45-54	55-64	65-74	75+
Total number of persons	10,311	3,790	4,109	5,506	5,418	3,451	2,350
Income by Household							
<\$34,999	11%	10.7%	8.3%	6.7%	10.3%	15%	34.6%
\$35,000-\$49,999	12.9%	7.6%	5.0%	4.4%	5.0%	6.6%	14.6%
\$50,000-\$74,999	27.7%	13.9%	9.6%	9.0%	10.7%	18.0%	26.3%
\$75,000-\$99,999	19.8%	17.2%	13.5%	11.1%	12.9%	16.2%	4.9%
\$100,000-\$149,999	17.8%	30.3%	24.8%	27.2%	23.4%	20.5%	9.7%
\$150,000-\$199,999	4.0%	9.2%	17.0%	16.5%	15.0%	9.8%	5.0%
\$200,000+	6.9%	11.0%	21.8%	25.2%	22.6%	13.9%	5.0%

Source; US Census; ESRI Demographic Forecasts. Table prepared by TMA 2018.

Table 4 provides a comparison of population growth in the counties that make up the region including the lower Hudson Valley, southern Connecticut and northern New Jersey. As illustrated in Table 4 below, the 0.41 percent annual growth experienced in Putnam County during the period from 2000 to 2010 slowed to 0.12 percent annual growth during the period 2010 to 2018. This slowdown in growth is certainly influenced by the actions taken by the Carmel Town Board in 2002 in combination with the 2007 - 2008 recession. It is noteworthy that the growth in the surrounding Counties did not slow down to nearly the same extent, indicating the Zoning action taken by the Town of Carmel had a real impact. As Table 4 shows, the population density of 433 persons per square mile is by far the lowest of the Counties in the region, with only Orange County being close to the sparse density of Putnam County.

**Table 4
Population Growth Comparison by County 2000 - 2023**

County	Land Area (Sq. Miles)	2000 Population	2010 Population	2010 Population Density (Person / Sq. Mile)	2018 Population	2023 Population Projection	2000-2010 Annual Rate	2010-2018 Annual Rate	2018-2023 Annual Rate Projection
Putnam	246	95,745	99,710	433	100,715	101,398	0.41%	0.12%	0.14%
Westchester	500	923,459	949,113	880	977,073	997,054	0.27%	0.35%	0.41%
Rockland	199	286,753	311,687	1,890	328,812	339,495	0.84%	0.65%	0.64%
Orange	839	341,367	372,813	471	393,529	407,897	0.89%	0.66%	0.72%
Bergen	247	884,118	905,116	4,070	951,353	979,924	0.24%	0.61%	0.59%
Fairfield	837	882,567	916,829	1,520	958,883	982,066	0.38%	0.55%	0.48%

Source: US Census; ESRI Demographic Forecast; Putnam County Department of Planning

As shown in Table 5, during this same time period, the over 50 population grew compared to the overall population. Putnam County has the highest percentage of seniors with 41.4 percent of the population over the age of 50 in 2018. The ESRI Demographic Forecasts show this trend is projected to continue with estimates of 43 percent of the total population being over 50 by 2023. This trend is directly related to the availability of senior housing in combination with the lack of new market-rate entry level housing that would attract young families. The current Carmel residential 3-acre zoning exacerbates these demographic trends by failing to provide balanced housing opportunities, especially for young people including millennials.

Given the current economic conditions, the existing smaller unit housing stock on smaller lots is not becoming available to young entry level buyers as existing residents are staying in their homes longer and ageing in place. The Town can rectify this by adding a non-age-restricted multi-family zone to balance the senior multi-family zone that currently exists in the Town.

**Table 5
Population Age 50+ Comparison by County 2010 - 2023**

County	2010 Population 50+	2010 % of Total Population	2018 Population 50+	2018 % of Total Population	2023 Population Projection 50+	2023 % of Total Population
Putnam	34,831	34.9%	41,665	41.4%	43,579	43.0%
Westchester	326,888	34.4%	375,233	38.4%	397,142	39.8%
Rockland	100,395	32.2%	115,559	35.1%	121,326	35.7%
Orange	110,943	29.8%	134,130	34.1%	144,086	35.3%
Bergen	324,155	35.8%	379,590	39.9%	404,354	41.3%
Fairfield	303,038	33.1%	358,900	37.4%	383,056	39.0%

Source: ESRI Demographic Forecasts based upon US Census Data.

Table 6 provides a summary of the demographic profiles of the region. This comparison shows that Putnam has the lowest population, but the highest median age. Putnam County shows a steep drop in the rate of growth from 2000 to 2010 and an even steeper drop from 2010 to 2018 compared to the surrounding counties. The ESRI population projections to 2023 are also substantially lower than for the other counties. As shown in Table 5, the 2018 data shows that Putnam County has the highest percentage of over 50 population and this trend is expected to continue

through 2023. Putnam County also has the highest percentage of owner-occupied units (76%) compared to other counties, which are generally at about 64%.

Table 6
2018 Demographic Profile by County

County	2018 Population	2018 Median Age	Total Households 2018	Owner Occupied Housing Units 2018	Renter Occupied Housing Units 2018	Percent of Owner/ Rental Housing units	Median Household Income 2018	Average Home Value 2018
Putnam	100,715	44.0	35,299	26,830	8,469	76% / 24%	\$103,145	\$498,140
Westchester	977,073	41.2	355,434	209,823	145,611	59% / 41%	\$95,623	\$752,190
Rockland	328,812	37.0	103,673	71,245	32,428	69% / 31%	\$97,147	\$559,161
Orange	393,529	37.2	131,853	84,155	47,698	64% / 36%	\$78,935	\$360,589
Bergen	951,353	42.6	348,209	221,653	126,556	64% / 36%	\$92,940	\$586,135
Fairfield	958,883	40.6	346,445	322,550	123,895	64% / 36%	\$90,961	\$632,735

Source; US Census; ESRI Demographic Forecast

3.0 SCHOOLDISTRICT ENROLLMENTS

The Town of Carmel is located primarily in the Carmel and Mahopac Central School Districts. There is a very small portion of the northeast corner of the Town located in the Brewster Central School District, which based upon the relative size is not included in this study.

According to the demographic projections provided by the Mahopac and Carmel Central School Districts, enrollments have been steadily declining in both the Carmel and Mahopac Central School Districts for more than ten years.

Peak enrollment for the Carmel CSD occurred in 2002 when enrollment was 4,956 students; compared to the 2018 enrollment which was 4,040 students, a reduction of 916 students or an 18.5 percent decline from peak enrollments. According to the projections made by Westchester Southern BOCES, this trend is expected to continue to 2023 and beyond, with the 2023 enrollment for the Carmel School District estimated at 3,662, which represents a 26.1 % decline from the peak enrollment. Carmel School District projections to 2028 estimate the student population to be 3,479, which is a reduction of approximately 1,500 students equating to an almost a 30% decline from peak enrollments district wide.

Similarly, peak enrollment for the Mahopac CSD occurred in 2004 when enrollment was 5,369 students; compared to the 2018 enrollment which was 4,138 students a reduction of 1,231 students or about a 22.9 % decline. This trend is expected to continue to 2028 and beyond, with the 2023 enrollment estimated at 3,671 which represents a 31.6 % decline from the peak enrollment of 2004. Projections for 2028 estimate 3,448 students which is a reduction of almost 2,000 students which equates to a decline of more than 35% compared to the 2004 peak enrollments.

**Table 7
School Populations - Town of Carmel 2002 to 2028**

School District	Peak Year Enrollment	2010 Enrollment	2018 Enrollment	Decline from Peak to 2018	2023 Enrollment Projection	Decline from Peak to 2023	2023 Reduction in number of Students from Peak	2028 Enrollment Projection	Decline from Peak to 2028	2028 Reduction in number of Students from Peak
Carmel (Peak 2002)	4,956	4,581	4,040	18.5%	3,662	26.1%	1,294	3,479	29.8%	1,477
Mahopac (Peak 2004)	5,369	4,922	4,138	22.9%	3,671	31.6%	1,698	3,448	35.7%	1,921

Source: Mahopac School District, Superintendent of Business, July 2018
Carmel Superintendent of Business, Western Suffolk BOCES, NYS ED BEDS 2018

The Superintendent for Business in the Mahopac Central School District indicated, that although enrollments are declining there are no plans for expansion or contraction at this time⁵. A review of both school district's budget for the 2018-2019 school year indicates that both districts have allocated funds for School Bus Replacement and for the provision of School Safety Officers. No other capital improvements are currently scheduled.

A Review of current school enrollment and budget data and school enrollment projections for the next 5 to 10 years indicate continuing declines for both the Carmel and Mahopac School Districts by more than 30% compared to peak enrollments. This substantial declining enrollment trend has the potential to result in excess infrastructure, where the number of students is significantly lower than the enrollment capacity. The potential for the elimination of school clubs, sports teams and other extra-curricular activities will increase as enrollments continue to decline.

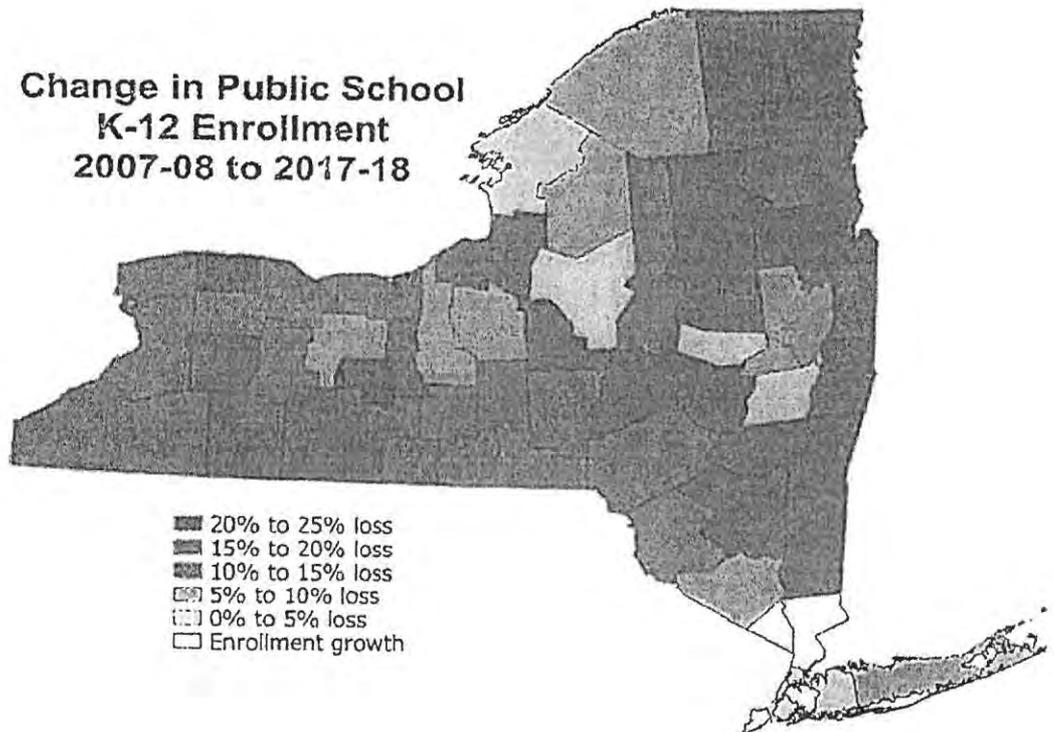
A recent report by the New York State Empire Center indicates enrollment reductions are taking place statewide with few exceptions.⁶ The map below focuses on trends over the past 10 years. It should be noted that both Westchester and Rockland Counties are seeing school enrollment growth.

In contrast, Putnam County is seeing enrollment losses of 20 to 25%. The Carmel and Mahopac School Districts have lost 21% of their enrollment since their respective peaks in 2002 and 2004 and are projected to lose up to 35 percent of their peak enrollment by the 2028 school year.

⁵ Phone call with Greg Sullivan, Superintendent for Business Mahopac CSD, July 11, 2018

⁶ NYS Empire Center Research & Data, September 2018; Data posted at <http://www.p12.nysed.gov/irs/statistics/enroll-n-staff/home/html>

**Change in Public School
K-12 Enrollment
2007-08 to 2017-18**



At the same time enrollments are declining, legacy costs, i.e. pensions, disability, state mandated expenses, which make up about 50% of the school budget costs continue to increase. Although school districts can take measures to control their operating expenses, the legacy costs are not optional and cannot be reduced.

An increase in residential development would result in an increase in the assessed valuation of the School Districts, which translates into additional school tax revenues. Since the infrastructure and staff resources are already in place, the costs for new students associated with multi-family housing would be minimal. It should also be noted that while market-rate multifamily housing would provide a significant increase in the districts assessed valuation, the ratio of students associated with multifamily housing is low compared to traditional single-family housing – and as such would not over-burden the schools. Families are having fewer children than the previous generation in general and market-rate multifamily housing results in an even lower generation of school age children. A review of the Census data in Table 9 indicates the make-up of the families today is much different that it was 25 years ago. Current demographic research is being conducted⁷. Preliminary data indicates that today's market-rate multi-family buyer has even fewer children than previously projected.

⁷ New Jersey Planning Conference January 25-28, 2018. Demographic Multipliers Progress, Research and Applications. David Listoken, Ph.D. CUPR.

The ULI study indicates that market-rate multifamily housing typically pays its own way. A typical mixed-use development with retail, office, and market-rate multifamily housing may subsidize the schools and other public services required by residents of low-density housing in the same community.”⁸ The ULI Study further states, “Thus, introducing higher density projects into a community will actually increase that community’s revenue without significantly increasing the infrastructure and public service burdens.” Blending market-rate multifamily housing into low-density communities can help pay for school expenses without drastic increases in the number of students. Diversifying housing options and adding amenities like shops and offices close by will improve the quality of life and attract businesses and people that will strengthen the community’s economic stability. Increasing density provides a real economic boost to the community and helps pay for the infrastructure and public services that everyone needs.”⁹

The lack of market-rate multifamily housing for young people advances the demographic trend in Carmel that sees the population of people aged 35 to 55 declining, and the portion of people aged 55 and over growing significantly, creating significant adverse consequences for Carmel and Mahopac schools and other adverse economic and fiscal impacts. As shown in Table 2, by 2028 it is estimated that the population below 25 will be less than 25% of the overall population and that the over 55 population will constitute about 32% of the population. This population distribution will have ramifications as to where the emphasis is placed on allocating Town resources. This in turn has the potential to negatively affect the commercial businesses in the Town. Failed businesses will ultimately have a negative implication on the tax bases of the Carmel and Mahopac School Districts and hurt the hamlet business districts with empty stores and closed businesses.

4.0 NEED FOR MARKET-RATE MULTIFAMILY HOUSING

The severe slowdown in growth in Putnam County and the Town of Carmel compared to the surrounding counties indicates there are contributing factors that need to be addressed.

The demographic analysis above shows the declining population of persons 35-55 years old, the age cohorts most likely to have young families. There is a need for additional housing for this segment of the population. Aging baby boomers are tending to stay in their houses longer while ageing in place, closing out opportunities for the young home buyer and millennials to enter the housing market. The declining school enrollments underscore the need for additional young families to fill the existing school infrastructure, while at the same time increasing the assessed valuation in the districts to help to broaden the overall tax base. A review of the data presented in Table 3, illustrates that a household income of \$100,000 to \$149,999 is

⁸ Higher-Density Development – Myth and Fact, Urban Land Institute, Sierra Club, National Multi Housing Council, American Institute of Architects, Washington D.C. 2005. Pg. 11

⁹ Ibid, Pg. 12

generally necessary to live in Carmel today. This is a significant number, typically requiring more than one income per household.

The current residential zoning in Carmel is almost exclusively restricted to single family homes on three acre lots, which does not provide for an array of balanced housing opportunities, particularly entry level housing for young households and transitional housing for divorcees and others in transition. The failure to provide balanced housing opportunities, exacerbates the current demographic trends especially for young people. This failure leads to the lost economic and fiscal benefits for the Town and the business community and could easily be defined as "exclusionary zoning." Younger families mature into families with higher incomes which results in more disposable income, which helps support the businesses and overall economic vitality of the Town.

The provision of multifamily housing can help to meet the Town's housing needs and alter the current demographic trends in the Town of Carmel and Putnam County of an aging population and increase in the number of younger people. The lack of young people creates a social void and results in a hole in the fabric of the community. Entry-level housing opportunities will serve to encourage the growth of this segment of the population. Younger families can have a positive impact on economic and fiscal matters, including impacts on real estate taxes and commercial businesses. As shown in the attached Table 10, family households of 3 to 5 people spend much more money in Carmel than smaller senior households of 1 to 2 people. Once comfortable with the Town and the school system, as members of the community, these people could eventually sell their entry level house and buy a larger single-family home on a larger lot for their expanding family in the Town and School District.

The ULI Study states, "Providing balanced housing options to people of all income groups is important to a region's economic vitality. The availability of multifamily housing helps attract and retain the workers needed to keep any economy thriving. In many American towns and cities, rapidly rising house prices are forcing working families to live farther away from their jobs."¹⁰

Most recently an article in the NY Times Real Estate section confirms that the trends predicted by ULI are indeed happening. ¹¹In this area, millennials desire to move to the suburbs and are looking for housing that meets their needs and fits their budget.

The millennials who are looking to buy houses today have somewhat different priorities compared to the generation before them. They are focused on a life balance and value their free time as much as their careers. They are looking for smaller lots, low maintenance, common amenities, and no need for major renovations. As described above they are usually balancing home and work with family life and want

¹⁰ Ibid, pg. 32

¹¹ NY Times, September 30, 2018, Real Estate

a home that's easy to maintain. Their needs are very similar to the needs of active adults 55+. The housing that is desirable for seniors is the same type of housing desirable to young families. Young people desire 2 to 3 bedrooms while seniors desire 2 bedrooms plus a home office. Common amenity space and low maintenance is important to both groups. Both of these populations clearly prefer new or recently updated housing in move-in condition.

Based upon the similarities in the needs of young people starting out and active adults 55+ or senior citizens, general population multifamily housing would likely accommodate a mix of young families and seniors. If the age restriction is lifted, the new non-age restricted communities likely will have a mix of 50% age 55 and up and 50% age 55 and below, similar to the mix at Heritage Hills in Somers¹². By encouraging the development of market-rate multifamily units that are conducive to senior living, i.e. master down single living level layouts, the Town can continue to provide for the needs of its seniors within general population communities. A combination of active adult housing for persons above age 55 and non-age restricted market-rate multi-family housing for young people can serve to address both the current and future needs of Carmel and Putnam demographics within the same new communities. If a senior wants to live in a community that is exclusively 55+, they have the option to buy at one of the 55 and over communities that currently exist in the Town.

Young entry level homebuyers will eventually get comfortable as community members of the Town and School Districts, and develop a tangible stake in the community. As they outgrow an entry-level home they will likely look to buy a larger single-family home in the Town of Carmel, utilizing the substantial number of larger single-family homes on 1 to 3 acres currently existing throughout Carmel.

The ULI Study supports these concepts. "Higher density development can be a viable housing choice for all income groups and people in all phases of their lives. Many financially secure baby boomers, who have seen their children leave the nest, have chosen to leave behind the yard maintenance and repairs required of a single-family house for the more carefree and convenient lifestyle multifamily housing provides. Interestingly, the baby boomers' children, the echo boomers, are entering the age where many will likely live in multifamily housing. Just entering careers, many are looking for the flexibility of multi-family living to follow job opportunities. Their grandparents, likely on a fixed income, may also prefer or need to live in multifamily housing as physical limitations may have made living in a single-family house too challenging."¹³

A recent Study (2017), by the National Association of Realtors (NAR) that millennials are finally buying residences of their own. Of all the homebuyers in the U.S. more than a third were millennials in 2017. They aren't buying in the cities where they

¹² Heritage Hills was constructed as an age-restricted community of more than 2,500 total units but was ultimately converted to a general population development based upon market conditions.

¹³ Ibid, pg. 32

have been renting for over a decade. Those who choose to own their home are packing their bags and moving largely to the suburbs.¹⁴

The ULI Study indicated “This country’s population is changing, and so are its real estate preferences. For the first time there are more single-person households (26.4 percent) than married couples with children (23.3 percent). The groups growing the fastest, people in their mid-20’s and empty nesters in their 50’s, are the groups most likely to look for an alternative to low-density, single family housing.”¹⁵ The most recent Census indicates this trend is continuing as illustrated in Table 8. Based upon the 2010 Census Data, there continue to be more single-person households (26.7 percent) than married couples with children (20.2 percent).

The Country’s population is changing and so is family structure. It is no longer necessarily the norm to have two married parents, two to four children and a dog. There is a significant number of married couples without children, there are many blended families as a result of current divorce rates, there is a growing number of same sex family units and there are other types of non-family households.

Table 8 below shows the current statistics of households by type as reported in the 2010 US Census. These numbers are likely to show an even wider range when the Census is updated in 2020.

Married Couples with Children	20.2%
Married Couples without Children	28.2%
Other Family Households	18.1%
Men Living Alone	11.9%
Women Living Alone	14.8%
Other non-Family Households	6.9%
Source: US Census 2010: DP-1	

The numbers in Table 8 above are striking. There are more married couples without children than there are married couples with children. The Town must adapt and address this real change in household types. The household makeup above is very different than just 20 or 30 years ago. Large lot single family housing no longer meets the needs of a majority of homebuyers today as shown by the data above and yet these new household configurations need somewhere to live that suits their needs.

5.0 EXCLUSIONARY ZONING

The current administration in Washington is continuing the direction of the prior administration by taking an aggressive stance regarding the enforcement of the Federal Fair Housing Act¹⁶. Ben Carson, Secretary of Housing and Urban Development, wants to spur the construction of multi-family housing all over the

¹⁴ Nation Association of Realtors Report, 2017.

¹⁵ Ibid, pg. 29

¹⁶ NY Times, August 21, 2018.

Country. The goal is to end exclusionary zoning that restricts housing choices and affordability for the general population, particularly new homebuyers.

Exclusively large lot zoning does not meet the needs of the Town's existing demographics nor provide opportunities for future growth. This exclusionary zoning makes the Town very vulnerable to a federal fair housing lawsuit similar to Westchester County which affected many of its municipalities in recent years. The Federal Fair Housing Act, guarantees the opportunity to choose where one lives free from obstacles. This promise of fair housing choice requires vigorous enforcement of laws advancing the community's commitment to fair housing. A community must take appropriate actions to overcome the effects of any impediments to Affirmatively Further Fair Housing (AFFH). The provision of a diverse housing market that meets the needs of all members of the community is necessary to help in meeting these goals. Clearly the Town's current 3-acre zoning creates a barrier and severely limits the housing choices for many people. In addition, large lot zoning has a significant impact on housing affordability which leaves the Town vulnerable to a federal lawsuit similar to Westchester County.

6.0 SURROUNDING PROPERTY VALUES

The ULI Study concludes, "No discernible difference exists in the appreciation rate of properties located near higher-density development and those that are not. Some research even shows that higher-density development can increase property values."¹⁷

A well-designed multifamily development can add to the value of the surrounding neighborhood. There is more flexibility of design and opportunities for creativity in larger cluster developments in terms of landscaping, site layout, amenity packages and cohesive architecture. When designed well, the multifamily development creates a sense of place where a community of people live together.

The ULI publication provides the results of three separate studies which indicate the value of surrounding single family real estate does not suffer declines in value as a result of nearby market-rate multifamily development. One study by the National Association of Home Builders looked at data from the American Housing Survey, which is conducted every two years by the U.S. Census Bureau and the Department of Housing and Urban Development. It found that between 1997 and 1999, the value of single-family houses within 300 feet of an apartment or condo-minimum building went up 2.9 percent a year, slightly higher than the 2.7 percent rate for single-family homes without multifamily properties nearby. A long-term study by Harvard University's Joint Center for Housing Studies published in 2003 also confirmed that multifamily units pose no threat to nearby single-family house values, based on U.S. Census data from 1970 to 2000. Not only is there compelling evidence that increased density does not hurt property values of nearby neighbors; researchers at Virginia Tech University have concluded that over the long run, well-placed market-rate multifamily housing with attractive design and landscaping actually increases the overall value of detached houses nearby. They cite three possible reasons. First, the new condominiums could themselves be an indicator that an area's economy is vibrant

¹⁷ Ibid, Pg. 13

and growing. Second, multifamily housing may increase the pool of potential future homebuyers, creating more possible buyers for existing owners when they decide to sell their houses. Third, new multifamily housing, particularly as part of mixed-use development, often makes an area more attractive than nearby communities that have fewer housing and retail choices.¹⁸

	Not Near Multifamily	Near Multifamily	Near Low-Rise Multifamily	Near Mid- or High-Rise Multifamily
Appreciation Rate	2.66%	2.90%	2.91%	2.79%
Source: NAHB based upon American Community Housing Survey; US Census; US Department of Housing and Urban Development				

7.0 RETAIL GOODS & SERVICES

Attachment A, provides a comparison of the Retail Goods and Services expenditures for a general population multifamily housing community, based upon the example of Heritage Hills Village in the adjacent Town of Somers; to an all senior citizen housing community, based upon the example of Jefferson Village down Route 6, in the Town of Yorktown.

The data in the table shows the average annual household expenditure on various spending categories. As the table shows the median income and financial assets of the all senior development is equal to or less than half that of the general population community. Similarly, expenditures on food, apparel, entertainment, household expenses, transportation and travel are generally half from the senior community compared to the general population community. Younger families of 3-5 people eat out more after sporting events and other school activities. They also spend more on retail goods and services, i.e. clothes and shoes for growing children, electronics, groceries school supplies, etc.

The reduced income and expenditures of the senior population affects the economy of the Towns commercial base. Senior households of 1-2 persons, being on a fixed income, typically have less discretionary income to spend. Seniors needs also tend to be simpler, they don't need new sneakers every 6 months, nor a new soccer ball or ballet costume and constant new clothes purchases the same way a young family might.

The spending habits of young professionals and families supports and maintains a wider diversity of the Town's business types. These families are more likely to need a new car, purchase new computers or cell phones, spend money on pets and have a higher entertainment budget for movie, video games, sports centers, etc. A younger professional population will help create a stronger local economy, which will help

¹⁸ Ibid, Pg. 14

retain and attract businesses. The differential in consumer expenditure potential between senior households and young professionals and families will help to feed the Town of Carmel business community allowing it to thrive and prosper and will result in increased sales tax revenue to Putnam County.

Market-rate multi-family housing, which serves as entry-level housing, has the ability to attract younger households, due to the difference in monthly housing expenses compared to a large single-family home on three acres. It also provides a housing option for young people who have grown up in Carmel and those looking to return to Carmel after college to continue to live, work and shop in the area. This could also help divorced persons to remain close to their families.

Appendix A also provides a comparison to the Retail Goods & Services of a typical single-family development in the Town of Carmel, based upon the example of the Willow Ridge Development. As the Table shows there are similar spending patterns for the Multifamily Mixed-use development as there are from the single-family residential neighborhood.

An important aspect of the provision of multifamily housing is the provision of a growing and ready supply of future occupants for the larger move-up single-family housing stock already existing in the Town. Once an entry level resident has established roots in the community, they are more likely to look for housing in Town to grow into. These people will have a stake in the community, be comfortable with the schools and other community programs and have established spending patterns that support the local economy. General population multi-family housing provides this opportunity while at the same time bringing new residents who will support the local economy in a similar manner to single family housing. Multi-family housing will not only serve as entry level housing but will also be a viable option for seniors.

8.0 OTHER CONSIDERATIONS

8.1 Brain Drain

Putnam County and the surrounding area is a great place to raise a family. The new homebuyers of the 1960's thru the 1980's raised many families here. Those children are now grown and starting families of their own. The lack of housing options for persons in the entry level housing market, generally the population (25 - 40) is forcing many people who grew up in Carmel to leave or not return. Young persons who do not return to the area after attending college results in a lost potential for them to utilize their education here. The lack of multi-family housing in Carmel is contributing to the brain drain problem in Carmel and the lower Hudson Valley. The lack of such housing is forcing educated millennials to leave the area or not even consider moving here in search of housing choices or reasonably priced housing that meets their needs. This is a loss to the business community, the many volunteer organizations and to the larger corporations who have located in the region and support the economy.

8.2 Community Needs

The Town government is tasked with the job of meeting their resident's needs. Carmel's aging population will have an impact on the Town's priorities for recreation facilities, municipal services and spending. If the existing demographic trends continue, such priorities will need to shift away from facilities serving families and be shifted toward a clearly growing senior population. This creates a negative disincentive cycle as fewer services for families will encourage even more families to leave or not to come to Carmel to live and raise a family.

In a similar manner, the infrastructure needs and curriculum of the Town's School districts will need to adjust if school enrollments continue to decline. There may also be budgeting conflicts as a growing number of residents no longer have students enrolled in the school and are thus less inclined to support increases in expanding school budgets. By 2028 the reduction in school enrollment is projected to approach 35%. Continuing legacy costs will continue to rise without any way to slow down the cost increases. This trend can already be felt. The 2018 Budget for the Carmel Central School District passed by a vote of 678 to 554, not an overwhelming margin. The voting margin on the school budget in Mahopac was more supportive at 1,261 to 573 in support of the 2018-2019 Budget.

Infrastructure needs in general are a continuing concern of Putnam County and the local municipalities. Putnam County has recently (July 2018) published a study entitled Putnam County Commercial Corridors Study¹⁹ which identifies the need for additional sewer infrastructure and transportation improvements by region in the County. The County acknowledges the need for diversity of housing, identifies the infrastructure improvements necessary to support a higher density of housing and acknowledges the contribution additional development would provide to help defray the costs of the associated costs of the improvements. Carmel is fortunate to have areas that are already serviced by municipal water and sewer and are ideal areas for both non-age restricted multifamily housing and senior housing developments. It should be noted that a common community septic and common community sewer is a viable option for clustered multifamily development in areas where sewer is not available. Common community water supply (wells) is also a viable option where municipal water service is not available.

Volunteer organizations such as the volunteer fire department, volunteer ambulance, Lions, Knights of Columbus, scout leaders, sports programs etc. are most typically populated by young family-oriented persons. A lack of housing that meets the needs of this population will result in fewer persons who are inclined to volunteer in the many valuable community organizations that help create real community character and a special Town. Continuing Town and School legacy costs will continue to rise without any way to slow down the cost increases.

¹⁹Putnam County Commercial Corridors Study, July 2018

8.3 Traffic

As discussed in Section 5.0, the housing needs of active adults, seniors and young millennials are similar. It is likely that a general population multifamily housing project could include a significant percentage of residents over the age of 55 who would be looking for a cost-effective, maintenance free lifestyle. Trip generation characteristic of a 100 % age 55 and above community compared to a mixed non-age restricted community where approximately half the residents are below age 55, would be similar. Trip generation rates for senior housing and non-age restricted multifamily housing development are among the lowest residential trip rates.

The ULI study confirms the comparatively low trip generation rates of multifamily housing compared to traditional single-family suburban housing and indicates that single family detached houses have an average of 10 trips per day, whereas a multifamily unit has an average of 6.3 trips per day. This is consistent with NYS DOT counts which indicates that traffic volumes have gone down over the past 10 years, leaving additional capacity on area roadways.

The number of trips per unit is going down. The most recent (2017) Institute of Transportation Engineers (ITE), publication Trip Generation 10th Edition the average total trips per day for Single family is 9.5 compared to the average total trips per day from a multifamily unit of 5.4 trips. Both of these factors have dropped since the last edition of Trip Generation. Multifamily residents typically have fewer cars and fewer drivers than a typical suburban single-family residence. Multifamily living is also more conducive to transit opportunities. Even in semi-rural environments, the concentration of population in a multi-family development lends itself to being a designated bus stop or car-pooling location.

9.0 RECOMMENDATIONS

Zoning is the legal mechanism for implementation of a community's goals with regard to development including housing and business development. Revisiting the concept of general population, non-age restricted multifamily housing in the Town would provide for balance in the Towns housing options to help to address the unmet need for entry level and maintenance free housing options for all ages. It would also allow the Town to comply with the Federal Fair Housing Law.

It is recommended that the existing multi-family development provision that erroneously remains in the Zoning Code (§156-28), even though the use is currently prohibited in Town, be re-used and updated to allow for the use.

Then following zoning text is recommended:

Key:

Text in black is existing

~~Text in Red is proposed to be deleted~~

Text in Blue is proposed to be added.

§ 156-28 Multifamily developments.

A. In the R Residential Zones, C – Commercial and C-BP – Commercial Business Park Zones, multifamily developments and their on-site accessory uses for parking and recreation shall be permitted ~~as a garden apartment design or townhouse design,~~ provided that:

- (1) The site of the development shall be at least ~~10~~ 5 acres for multi-family developments of 39 or fewer units, or 10 acres for multi-family developments of 40 units or more.
- (2) The site of a multi-family development consisting of 40 or more units in the R – Residential zoning district must be adjacent to property located within the C – Commercial or C/BP – Commercial Business Park zoning districts in the Town of Carmel.
- (3) The site of a multi-family development consisting of 40 or more units in either the C – Commercial or C/BP – Commercial Business Park zoning districts must be adjacent to property located within the R – Residential zoning district in the Town of Carmel.
- (4) The maximum permitted density shall not exceed five units per acre, ~~in a R-MF and 3.4 units per acre in an R-MFA Zone.~~
- (5) Multi-family developments consisting of 40 or more units must have its primary access driveway directly off a State Highway located in the Town of Carmel, and said access shall not run through land in any another municipality.
- (6) All multi-family developments consisting of 40 or more units shall be served by municipal or community water and municipal or community sewer or septic.
- (7) For each housing unit there shall be provided a minimum of two on-site parking spaces for each three-bedroom unit, 1.5 on-site parking spaces for each two-bedroom unit, 1 on-site parking space for each one-bedroom unit and 1.25 on-site parking spaces for each studio unit. Additionally, 2 guest parking space shall be provided for every 5 units. ~~two on-site parking spaces as defined in this chapter. However, for multifamily developments (nonapartment) that are designated for occupancy by the elderly exclusively, there shall be a minimum of 1.5 on site parking spaces for every dwelling unit. No parking space shall be located in a front setback area or within 10 feet of any side or rear lot line, with the exception of driveway parking for townhouses.~~
- (8) The building height for a multi-family development of 40 or more units shall not exceed ~~35~~ 40 feet. A maximum of 3 stories shall be permitted above an enclosed or semi-enclosed garage. The building height for a multi-family development of 39 or fewer units shall not exceed 35 feet. A maximum of 2 stories shall be permitted above an enclosed or semi-enclosed garage.

- (9) Coverage of the lot by buildings shall not exceed 30% for multi-family developments of 40 or more units, or 35% for multi-family developments of 39 or fewer units.
- (10) There shall be a distance ~~of at least 50 feet~~ between all buildings of a distance sufficient to meet Fire Code access requirements.
- (11) No building shall exceed a length of 200 feet in multi-family developments of 40 or more units, or 100 feet in length in multi-family developments of 39 or fewer units.
- (12) There shall be a perimeter building setback area of at least ~~400~~ 50 feet for apartment developments and 30 feet for detached buildings and townhouses, on all sides of the site. A comprehensive landscaping and screening plan shall be provided which shall be designed to mitigate visual impacts created by the multi-family development.
- (13) A total of not less than 300 square feet per dwelling unit shall be improved with recreational facilities, such as swimming pools, tennis, basketball and other court games, playground or other recreational equipment, gazebos, or walking, jogging or fitness trails for the use of the residents of the site and their guests. Such facilities shall not be operated for profit. No such recreational facilities shall be required for developments of 8 units or less.
- (14) In addition to the required 300 square feet per dwelling unit which shall be provided for recreational facilities for use by the residents of the site, the applicant shall pay to the Town of Carmel an amount to be established annually by the Town Board and on file in the office of the Town Clerk, for each dwelling unit shown on the site plan prior to the issuance of the certificate of occupancy. This amount shall constitute a trust fund to be used by the Town exclusively for park, playground or other recreational purposes, including the acquisition of property.
- (15) A landscaped buffer area of at least ~~10~~ 15 feet in width shall be provided along all property lines and around all parking areas. Such buffer planting shall be maintained at a height of at least four feet to satisfactorily screen the parking area.
- (16) No multifamily development ~~in a R-District~~ with direct access to a State Road shall contain more than 150 dwelling units per lot.
- (17) No multi-family development with direct access to a County or Local Road shall contain more than 39 dwelling units for projects served by municipal or community sewer and municipal or community water, or 20 units served by a subsurface septic system.
- (18) Adequate water supplies shall be made available the entire year for fire protection purposes. These sources may be pressured systems, cisterns or dry hydrants. The quantity available must meet NFPA Standard 1231

entitled "Standard on Water Supplies for Suburban and Rural Fire Fighting," primarily Tables 5-1.1(a) and (b). All water supply distribution points shall be readily accessible and so located that the maximum travel distance for fire-fighting apparatus shall not exceed 1,000 feet from distribution point to farthest delivery point.

- (19) All apartment buildings shall contain a fire suppression system.
- (20) A minimum of 650 square feet shall be provided for all dwelling units. The maximum number of bedrooms in a multi-family dwelling unit shall be three.
- (21) All requirements of the New York State Uniform Fire Prevention and Building Code and all applicable State, County and Town regulations shall be met.

Attachment A

Retail Goods and Services Expenditures

	2018 Population	Households	Median Age	Median Household Income	Financial Assets	Food At Home	Food away from Home	Apparel & Services	Entertainment & Recreation	Household Furnishings & Equipment	Household Operations	Transportation	Travel	Annual Household Total
Heritage Village Somers	2,715	1,240	55.6	\$115,246	\$70,012	\$14,298	\$6,979	\$3,625	\$5,778	\$2,367	\$3,010	\$9,759	\$3,220	\$49,036
Jefferson Village Yorktown	2,132	1,216	69.1	\$44,061	\$35,889	\$4,510	\$3,583	\$1,759	\$2,968	\$1,219	\$1,543	\$5,007	\$1,570	\$22,159
Census Tract 115 Block group 4 including Pulte Active Adult	1,778	722	46.6	\$72,320	\$47,731	\$6,266	\$5,143	\$2,713	\$4,105	\$1,649	\$2,183	\$6,779	\$2,225	\$31,063
Census Tract 115 Block group 3 including Willow Ridge	1,259	430	45.5	\$119,110	\$68,500	\$8,165	\$6,787	\$3,680	\$5,579	\$2,223	\$3,078	\$9,009	\$3,256	\$41,757
Town of Carmel	34,935	11,874	43.2	\$106,822	\$61,444	\$7,396	\$6,184	\$3,334	\$5,037	\$2,025	\$2,765	\$8,248	\$2,885	\$37,874

These figures represent the average spending in certain categories per household on an annual basis for comparison. They do not represent all household spending.

Exhibit C

CENTENNIAL GOLF PROPERTIES		
CSD #2 CAPITAL COST UNIT C		
Parcel	Units	Tax
44.2.4.1	3.99	\$ 3,734.62
44.2.4.2	20.85	\$ 19,515.50
44.2.3.2	13.34	\$ 12,860.57
44.2.3.1	13.78	\$ 12,898.01
44.2.2.2	25.71	\$ 24,064.44
44.2.2.1	84.39	\$ 78,988.63
Annual Total	162.06	\$ 152,061.77
Parcels-To-Date (18 Years)	17	\$ 2,585,050.09

CSD #2 O & M		
Parcel	Units	Tax
44.2.4.1	0	\$ -
44.2.4.2	0	\$ -
44.2.3.2	0	\$ -
44.2.3.1	0	\$ -
44.2.2.2	0	\$ -
44.2.2.1	23.8	\$ 4,284.07
Annual Total	23.8	\$ 4,284.07

CSD #2 WWTP	Flow in GPD	Note
Design Capacity	1,100,000	Assumed
Current Flow	750,000	Assumed
Unassigned Capacity	350,000	
Assigned	Carmel	
Less 10 Percent operating range	110,000	
Reserve Capacity	240,000	

Proposed Project Flow	Carmel	Southeast
Number of Units	40	80
ADF /unit	220	330
Total GPD per town	8,800	26,400
Project GPD	35,200	

Availability	Units C	GPM
Units	162.06	48,618
Existing	23.8	7,140
Available	138.26	41,478
Proposed	120	35,200
Difference	18.26	6,278

CSD # 2 CENTENNIAL GOLF PROPERTIES CAPTIAL BOND PAYMENT				
Year #	Year	CSD Captial Cost	Cumulative	Per Benefit Unit
1	1997	\$ 152,061.77	\$ 152,061.77	\$ 938.31
2	1998	\$ 152,061.77	\$ 304,123.54	\$ 1,876.61
3	1999	\$ 152,061.77	\$ 456,185.31	\$ 2,814.92
4	2000	\$ 152,061.77	\$ 608,247.08	\$ 3,753.22
5	2001	\$ 152,061.77	\$ 760,308.85	\$ 4,691.53
6	2002	\$ 152,061.77	\$ 912,370.62	\$ 5,629.83
7	2003	\$ 152,061.77	\$ 1,064,432.39	\$ 6,568.14
8	2004	\$ 152,061.77	\$ 1,216,494.16	\$ 7,506.44
9	2005	\$ 152,061.77	\$ 1,368,555.93	\$ 8,444.75
10	2006	\$ 152,061.77	\$ 1,520,617.70	\$ 9,383.05
11	2007	\$ 152,061.77	\$ 1,672,679.47	\$ 10,321.36
12	2008	\$ 152,061.77	\$ 1,824,741.24	\$ 11,259.66
13	2009	\$ 152,061.77	\$ 1,976,803.01	\$ 12,197.97
14	2010	\$ 152,061.77	\$ 2,128,864.78	\$ 13,136.28
15	2011	\$ 152,061.77	\$ 2,280,926.55	\$ 14,074.58
16	2012	\$ 152,061.77	\$ 2,432,988.32	\$ 15,012.89
17	2013	\$ 152,061.77	\$ 2,585,050.09	\$ 15,957.10
FUTURE				
18	2014	\$ 152,061.77	\$ 2,737,111.86	\$ 16,895.75
19	2015	\$ 152,061.77	\$ 2,889,173.63	\$ 17,834.41
20	2016	\$ 152,061.77	\$ 3,041,235.40	\$ 18,773.06

SUMMARY

Total Bond Benefit Units	162.06
O & M	23.8
Town of Carmel Development Potential/Zoning	40
Total projected Benefit Units usage	63.8
Percentage of Total	39.37%
Overage on 20 year bond	\$ (1,843,957.73)