

MICHAEL S. CAZZARI
Town Supervisor

ROBERT F. SCHANIL, JR.
Town Councilman
Deputy Supervisor

STEPHEN J. BARANOWSKI
Town Councilman
FRANK D. LOMBARDI
Town Councilman
SUZANNE MC DONOUGH
Town Councilwoman

TOWN OF CARMEL
TOWN HALL



60 McAlpin Avenue
Mahopac, New York 10541
Tel. (845) 628-1500 • Fax (845) 628-6836
www.ci.carmel.ny.us

ANN SPOFFORD
Town Clerk

KATHLEEN KRAUS
Receiver of Taxes

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

TOWN BOARD WORK SESSION
Wednesday, September 13, 2023 7:00pm

PLEDGE OF ALLEGIANCE - MOMENT OF SILENCE

- **Public Comments on Town Related Business (Five (5) Minutes Maximum for Town Residents, Property Owners & Business Owners Only)**

Town Board Work Session:

- **Review Town Board Minutes August 16, and September 6, 2023**

1. Mary Ann Maxwell, Town Comptroller – Anne Pasquerello, Chief of Staff – Consider Authorizing Request for Proposals for Copier Leases - Town Departments
2. Mary Ann Maxwell, Town Comptroller – Consider Request to Authorize Budget Revisions June-August 2023
3. Richard Franzetti, PE, Town Engineer – Consider Request to Acknowledge Emergency Repairs and Services CWDs 4, 5, 6
4. Richard Franzetti, PE, Town Engineer – Consider Request to Accept Proposal for Planning Consulting Services
5. Richard Franzetti, PE, Town Engineer – Consider Request to Authorize Renewal of Garbage Contract for Garbage Removal – Town Hall, CSD#s 2 and 4, CWD#2, Sycamore Park, Lake Casse Park, Lake Secor Park District and Highway Department
6. Michael Simone, Highway Superintendent – Consider Request to Declare Old Equipment Obsolete and Authorize Disposal
7. Michael Simone, Highway Superintendent – Consider Request to Attend Conference
8. Michael Carnazza, Building & Codes Enforcer – Consider Request for Fire Inspector to Attend Training Conference

- **Town Board Comments**
- **Motion to Move into Executive Session**

Executive Session:

1. Police Chief Anthony Hoffmann – Personnel
2. Mary Ann Maxwell, Town Comptroller - Personnel

- **Motion to Adjourn Meeting**

MICHAEL S. CAZZARI
Town Supervisor

ROBERT F. SCHANIL, JR.
Town Councilman
Deputy Supervisor

STEPHEN J. BARANOWSKI
Town Councilman
FRANK D. LOMBARDI
Town Councilman
SUZANNE MC DONOUGH
Town Councilwoman

TOWN OF CARMEL
TOWN HALL



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

ANN SPOFFORD
Town Clerk

KATHLEEN KRAUS
Receiver of Taxes

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

MEMORANDUM

Date: September 13, 2023

To: Supervisor Cazzari & Carmel Town Board

From: Anne Pasquerello, Chief of Staff & Mary Ann Maxwell, Town Comptroller

RE: Request for Proposals - Copiers for Various Town Departments

The current inventory of copiers is now coming to the end of their life expectancy. The copiers in the various Town Departments are over 10 years old.

After meeting with the various Town departments and discussing what their needs are, we have prepared the attached proposal for your review.

NAKA, the Town's IT provider, as well as Town Legal Counsel have also reviewed the proposal and found it to be acceptable in form.

We are respectfully requesting the Board to authorize Request for Proposals of Copiers for the various Town Departments.

Town of Carmel



Request for Proposals

2023 Copy Machine Replacements

September 13, 2023

TABLE OF CONTENTS

Introduction and Contact Information.....	3
Current Situation and Needs.....	4-5
Location Requirements/Replacement Equipment.....	6-13
Proposal Requirements.....	14
Proposal Time Line.....	15
Contract Award.....	16
Insurance Requirements.....	17

INTRODUCTION AND CONTACT INFORMATION:

This Request for Proposal (RFP) is being issued by the Town of Carmel (Town), a New York State Municipality located in Putnam County.

The Town is seeking proposals from qualified vendors to provide, install and support multifunction copying, printing, scanning and faxing systems that will meet the current and projected needs of the individual departments described in this document.

This RFP will define the scope of the work to be performed, the requirements the vendor must address, the method for response and the administrative requirements that must be followed.

Please submit all questions and requests for information regarding this RFP to:

Mary Ann Maxwell, Town Comptroller Email: mam@ci.carmel.ny.us
and/or Anne Pasquerello, Chief of Staff Email: amp2@ci.carmel.ny.us

Carmel Town Hall
60 McAlpin Avenue
Mahopac, NY 10541
Telephone 845-628-1500

Questions regarding this RFP, must be submitted in writing. Respondents may send via e-mail to Mary Ann Maxwell, mam@ci.carmel.ny.us or Anne Pasquerello amp2@ci.carmel.ny.us

RFP RETURN INFORMATION:

Responses to this RFP should be delivered, mailed or emailed to the above listed Submission Contact and received no later than:

*** 11:00am on October 19, 2023**

*** Proposals received after the date and time specified will not be opened**

PRE-PROPOSAL CONFERENCE/WALKTHROUGH: October 12th, 2023 at 11:00am

CURRENT SITUATION AND NEEDS:

The Town of Carmel is seeking proposals from qualified Vendors to provide, install and support multifunction copy, print, scan and fax equipment in the various department locations within the Town.

The RFP addresses the acquisition, installation, startup and support of said equipment for:

- **Assessor's Office**
- **Town Hall Main Floor**
- **Town Clerk**
- **Supervisor**
- **Building Department**
- **Police Department**
- **Town Hall Second Floor**
- **Recreation Department - Long Pond Road Office**

Each location has specific needs as relates to this equipment, which is outlined in the Location Requirements Section of the RFP beginning in Pages 6 through 13.

For each machine and location, Vendors should submit a detailed proposal meeting or exceeding the stated need. Each machine proposal should be accompanied by a detailed specification document defining all of the features and specifications of the equipment being proposed.

If there are any deficiencies between the capabilities of the equipment being proposed and either the current or requested equipment capabilities, the vendor proposal must clearly state these differences. Vendors should also clearly state where their proposals exceed the stated requirements.

Vendor proposals which are based on the NYS OGS Contract pricing should provide the OGS contract information with their proposal. If vendors are able to make proposals which improve on the pricing provided by the NYS OGS Contracts, they should do so and identify the alternative pricing as such.

Each Vendor proposal must clearly state anything the Town will need to provide for the Vendor's equipment to be installed and/or operate properly. This includes, but not limited to, server hardware or software, computer hardware or software, network infrastructure, cabling, etc.

If Vendors equipment requires specific computer operating systems for the printing, scanning or faxing features to operate properly, these requirements must be clearly stated in the Vendor's proposal.

Any incompatibilities between Vendor's equipment and the Town's existing IT systems that was not clearly identified by the Vendor in advance of the sale, will be the responsibility of the Vendor to correct at their sole expense.

For all locations except the Assessor's Office (which will be a countertop machine), equipment proposed must be free standing and include any optional equipment (stands or storage bins) to bring the machine to standard working height.

Some of the machines described herein are currently service as multifunction devices. Because of the day to day reliance on the printing, scanning and faxing capabilities of these machines, it will be extremely important that the delivery and installation of replacement equipment be well coordinated and executed. Replacement equipment must be completely installed with all features functional to all users on the same day the current equipment is removed.

Vendor should include removal of old equipment and destruction of hard drive within old equipment.

LOCATION REQUIREMENTS:

Town Hall Main Floor: The equipment in this location services approximately 15 users in multiple departments on the main floor of the Town Hall. The current equipment provides B&W copying on letter, legal and ledger size paper. It also staples, scans and emails to various departments with color scanning capability and faxing capability. A network connection exists at this location.

Current Equipment:	Konica Minolta Bizhub 552
Current Lease:	None
Copies Per Minute:	55
Sheet Capacity:	3,650
Tray Configuration:	2x500, 1x2500, 1x150BP
Document Feeder:	Yes
Duplex Copying:	Yes
Letter Folding:	No
Color Scanning:	Yes
Color Coping:	No
Scan to Folder and Email:	Yes
Network Printing:	Yes
Finisher Stapler:	Yes
Fax:	Yes

Replacement Equipment:

New Lease: Outright Purchase and 48 Month Lease Options with Per Page Cost For, Toner, Maintenance and Repair Services

Core Speed: 45 PPM or Faster

Feed Configuration: 3 Main Paper Trays (minimum) with 1 Manual (Bypass) Feeder. Main Paper Trays Should Include (2) 500 Sheet Capacity And 1 High Capacity. Each of the main trays should have adjustable (8.5x11, 8.5x14, 11x17")

Discharge Configuration: Options for Single and Multi-Drawer Finisher/ Stapler

Operational Features: B&W/Color Duplex Copying, B&W/Color Duplex Printing, Color Scanning with Scan to Folder & Scan to E-mail Capability.

- Optional Cost to Add Fax Capability.

Monthly Usage: Approximately 1,000 TO 3,000 Pages Per Month

Town Hall Second Floor: The equipment in this location services approximately 20 users in multiple departments on the second floor of the Town Hall. The current equipment provides B&W and Color copying on letter, legal and ledger size paper. It also staples, letter folding capabilities, scans and emails to various departments with color scanning capability and faxing capability. A network connection exists at this location.

Current Equipment:	Konica Minolta Bizhub C454
Current Lease:	None
Copies Per Minute:	45
Sheet Capacity:	3,650
Tray Configuration:	2x500, 1x2500, 1x150BP
Document Feeder:	Yes
Duplex Copying:	Yes
Letter Folding:	Yes
Color Scanning:	Yes
Color Copying:	Yes
Scan to Folder and Email:	Yes
Network Printing:	Yes
Finisher Stapler:	Yes
Printing/Copying Controls:	Controls/Reporting/Image
Fax:	Yes

Replacement Equipment:

New Lease: Outright Purchase and 48 Month Lease Options with Per Page Cost For, Toner, Maintenance and Repair Services

Core Speed: 45 PPM or Faster

Feed Configuration: 3 Main Paper Trays (minimum) with 1 Manual (Bypass) Feeder. Main Paper Trays Should Include (2) 500 Sheet Capacity And 1 High Capacity. Each of the main trays should have adjustable (8.5x11, 8.5x14, 11x17")

Discharge Configuration: Options for Single and Multi-Drawer Finisher/ Stapler and Hole Puncher and Letter Folding Capabilities

Operational Features: B&W/Color Duplex Copying, B&W/Color Duplex Printing, Color Scanning with Scan to Folder & Scan to E-mail Capability.

- Optional Cost to Add Fax Capability.

Monthly Usage: Approximately 3,000 TO 5,000 Pages Per Month

Town Clerk: The equipment in this location services approximately 3 users in the Town Clerk's Office. The current equipment provides B&W copying on letter, legal and ledger size paper. It also staples, scans and emails to various departments with color scanning capability and faxing capability. A network connection exists at this location.

Current Equipment:	Konica Minolta Bizhub 552
Current Lease:	None
Copies Per Minute:	55
Sheet Capacity:	3,650
Tray Configuration:	2x500, 1x2500, 1x150BP
Document Feeder:	Yes
Duplex Copying:	Yes
Letter Folding:	No
Color Scanning:	Yes
Color Copying:	No
Scan to Folder and Email:	Yes
Network Printing:	Yes
Finisher Stapler:	Yes
Fax:	Yes

Replacement Equipment:

New Lease: Outright Purchase and 48 Month Lease Options with Per Page Cost For, Toner, Maintenance and Repair Services

Core Speed: 45 PPM or Faster

Feed Configuration: 3 Main Paper Trays (minimum) with 1 Manual (Bypass) Feeder. Main Paper Trays Should Include (2) 500 Sheet Capacity And 1 High Capacity. Each of the main trays should have adjustable (8.5x11, 8.5x14, 11x17")

Discharge Configuration: Options for Single and Multi-Drawer Finisher/ Stapler

Operational Features: B&W/Color Duplex Copying, B&W/Color Duplex Printing, Color Scanning with Scan to Folder & Scan to E-mail Capability.

- Optional Cost to Add Fax Capability.

Monthly Usage: Approximately 2,000 TO 4,000 Pages Per Month

Supervisor's Office: The equipment in this location services approximately 3 users in multiple departments in the Supervisor's Office on the main floor of the Town Hall. The current equipment provides B&W and Color copying on letter, legal and ledger size paper. It also staples, capabilities, scans and emails to three (3) users with color scanning capability and faxing capability. A network connection exists at this location.

Current Equipment:	Konica Minolta Bizhub C454
Current Lease:	None
Copies Per Minute:	45
Sheet Capacity:	3,650
Tray Configuration:	2x500, 1x2500, 1x150BP
Document Feeder:	Yes
Duplex Copying:	Yes
Letter Folding:	No
Color Scanning:	Yes
Color Copying:	Yes
Scan to Folder and Email:	Yes
Network Printing:	Yes
Finisher Stapler:	Yes
Printing/Copying Controls:	Controls/Reporting/Image
Fax:	Yes

Replacement Equipment:

New Lease: Outright Purchase and 48 Month Lease Options with Per Page Cost For, Toner, Maintenance and Repair Services

Core Speed: 45 PPM or Faster

Feed Configuration: 3 Main Paper Trays (minimum) with 1 Manual (Bypass) Feeder. Main Paper Trays Should Include (2) 500 Sheet Capacity And 1 High Capacity. Each of the main trays should have adjustable (8.5x11, 8.5x14, 11x17")

Discharge Configuration: Options for Single and Multi-Drawer Finisher/ Stapler and Hole Puncher and Letter Folding Capabilities

Operational Features: B&W/Color Duplex Copying, B&W/Color Duplex Printing, Color Scanning with Scan to Folder & Scan to E-mail Capability.

- Optional Cost to Add Fax Capability.

Monthly Usage: Approximately 2,000 TO 4,000 Pages Per Month

Police Department: The equipment in this location services approximately 20 users in the Police Department. The current equipment provides B&W copying on letter, legal and ledger size paper. It also staples, capabilities, scans and emails to various departments with color scanning capability and faxing capability. A network connection exists at this location.

Current Equipment:	Konica Minolta Bizhub 423
Current Lease:	None
Copies Per Minute:	42
Sheet Capacity:	1,150
Tray Configuration:	2x500, 1x2500, 1x150BP
Document Feeder:	Yes
Duplex Copying:	Yes
Letter Folding:	No
Color Scanning:	Yes
Color Copying:	No
Scan to Folder and Email:	Yes
Network Printing:	Yes
Finisher Stapler:	Yes
Fax:	Yes

Replacement Equipment:

New Lease: Outright Purchase and 48 Month Lease Options with Per Page Cost For, Toner, Maintenance and Repair Services

Core Speed: 45 PPM or Faster

Feed Configuration: 3 Main Paper Trays (minimum) with 1 Manual (Bypass) Feeder. Main Paper Trays Should Include (2) 500 Sheet Capacity And 1 High Capacity. Each of the main trays should have adjustable (8.5x11, 8.5x14, 11x17")

Discharge Configuration: Options for Single and Multi-Drawer Finisher/ Stapler and Hole Puncher and Letter Folding Capabilities

Operational Features: B&W/Color Duplex Copying, B&W/Color Duplex Printing, Color Scanning with Scan to Folder & Scan to E-mail Capability.

- Optional Cost to Add Fax Capability.

Monthly Usage: Approximately 3,000 TO 5,000 Pages Per Month

Building Department: The equipment in this location services approximately 6 users in the Building Department on the second floor of the Town Hall. The current equipment provides B&W and Color copying on letter, legal and ledger and 4½ x 9” size papers. It also staples, scans and emails to six (6) users with color scanning capability. A network connection exists at this location.

Current Equipment:	Ricoh MP2554SP Configurable PTO Model
Current Lease:	None
Copies Per Minute:	25
Sheet Capacity:	2,200
Tray Configuration:	2x500,1x1000, 1x200BP
Document Feeder:	Yes
Duplex Copying:	Yes
Letter Folding:	No
Color Scanning:	Yes
Color Copying:	No
Scan to Folder and Email:	Yes
Network Printing:	Yes
Finisher Stapler:	Yes
Printing/Copying Controls:	Controls/Reporting/Image
Fax:	No

Replacement Equipment:

New Lease: Outright Purchase and 48 Month Lease Options with Per Page Cost For, Toner, Maintenance and Repair Services

Core Speed: 45 PPM or Faster

Feed Configuration: 3 Main Paper Trays (minimum) with 1 Manual (Bypass) Feeder. Main Paper Trays Should Include (2) 500 Sheet Capacity And 1 High Capacity. Each of the main trays should have adjustable (8.5x11, 8.5x14, 11x17”)

Discharge Configuration: Options for Single and Multi-Drawer Finisher/ Stapler

Operational Features: B&W Duplex Copying, B&W Duplex Printing, Color Scanning with Scan to Folder & Scan to E-mail Capability.

- Optional Cost to Provide A Color Copy / Print Capable Unit
- Optional Cost to Add Fax Capability.

Monthly Usage: Approximately 5,000 TO 12,000 Pages Per Month

Assessor's Office: The equipment in this location services approximately 5 users in the Assessor's Office on the second floor of the Town Hall. The current equipment provides B&W copying on letter, legal. It also has faxing capability. A network connection exists at this location. Countertop style machine and replacement unit will need to be same configuration.

Current Equipment:	Ricoh MP401SPF
Current Lease:	None
Copies Per Minute:	42
Sheet Capacity:	1,500
Tray Configuration:	2x650, 1x200BP
Document Feeder:	Yes
Duplex Copying:	Yes
Letter Folding:	No
Color Scanning:	Yes
Color Copying:	No
Scan to Folder and Email:	Yes
Network Printing:	Yes
Finisher Stapler:	No
Printing/Copying Controls:	Yes
Fax:	Yes

Replacement Equipment:

New Lease: Outright Purchase and 48 Month Lease Options with Per Page Cost For, Toner, Maintenance and Repair Services

Core Speed: 45 PPM or Faster

Feed Configuration: 2 Main Paper Trays (minimum) with 1 Manual (Bypass) Feeder. Main Paper Trays Should Include (2) 500 Sheet Capacity. Each of the trays should have adjustable (8.5x11, 8.5x14)

Discharge Configuration: Options for Single and Multi-Drawer Finisher/ Stapler

Operational Features: B&W Duplex Copying, B&W Duplex Printing, Color Scanning with Scan to Folder & Scan to E-mail Capability.

- Optional Cost to Provide A Color Copy / Print Capable Unit
- Optional Cost to Add Fax Capability.

Monthly Usage: Approximately 1,000 TO 2,500 Pages Per Month

Recreation Department: The equipment in this location services approximately 15 users in the Recreation Department. The current equipment provides B&W and color copying on letter, legal. It also staples, scans and emails to six (6) users with color scanning capability as well as has faxing capability. A network connection exists at this location.

Current Equipment:	Konica Minolta Bizhub C368
Current Lease:	None
Copies Per Minute:	36
Sheet Capacity:	6,650
Tray Configuration:	2x500, 1x2500, 1x3000LC, 1x150BP
Document Feeder:	Yes
Duplex Copying:	Yes
Letter Folding:	Yes
Color Scanning:	Yes
Color Copying:	Yes
Scan to Folder and Email:	Yes
Network Printing:	Yes
Finisher Stapler:	Yes
Printing/Copying Controls:	Yes
Fax:	Yes

Replacement Equipment:

New Lease: Outright Purchase and 48 Month Lease Options with Per Page Cost For, Toner, Maintenance and Repair Services

Core Speed: 45 PPM or Faster

Feed Configuration: 3 Main Paper Trays (minimum) with 1 Manual (Bypass) Feeder. Main Paper Trays Should Include (2) 500 Sheet Capacity And 1 High Capacity. Each of the main trays should have adjustable (8.5x11, 8.5x14, 11x17")

Discharge Configuration: Options for Single and Multi-Drawer Finisher/ Stapler

Operational Features: B&W/Color Duplex Copying, B&W/Color Duplex Printing, Color Scanning with Scan to Folder & Scan to E-mail Capability.

- Optional Cost to Add Fax Capability.

Monthly Usage: Approximately 2,500 TO 7,500 Pages Per Month

PROPOSAL REQUIREMENTS:

Vendors to Propose Complete Systems:

Vendor proposals must include all costs associated with equipment being proposed. Proposals should include equipment, delivery, installation, startup, user training, system maintenance and repairs. Equipment proposed should be selected to provide reliable service for five (5) years in the Town's operating environment. Proposals must include a provision for replacement equipment if problems preventing the use of the machine are not able to be resolved within five (5) business days.

Use and Maintenance Cost:

Usage and maintenance costs should be quoted on a cost per page basis with no monthly minimum. On optional color machines, separate prices should be provided for monochrome and color output.

Equipment Pickup at the End of the Lease:

Vendor proposals must include pickup of the leased equipment at the end of the lease period. Any proposal not including this provision, will not be considered.

System Compatibility Confirmation:

Vendors will be required to verify that the solution they are proposing is compatible with the Town's existing computers and IT systems.

Town Responsibilities:

Each Vendor proposal must clearly state anything the Town will be required to provide for the Vendor's equipment to be installed and operate properly. This includes, but is not limited to, server hardware/software, computer hardware/software, network infrastructure, cabling, etc. If the printing and/or scanning features of the Vendor's equipment are limited to functioning on specific computer or server operating systems, these limitations must be clearly stated in the Vendor's proposal.

System Demonstration:

If any equipment a Vendor is proposing is substantially different than the equipment currently in use at any of the locations, Vendors may wish to demonstrate the features of the replacement equipment. This demonstration may be conducted at the Vendor's office or at one of the Vendor's client sites.

Client References:

Vendors are required to submit four (4) client references for each different piece of equipment they are proposing. Vendors should be prepared to arrange for Carmel Town personnel to discuss the operation and maintenance history of the equipment with the client references. Each reference provided must be currently using the equipment being proposed to the Town. The equipment must have been in use for at least six (6) months and not more than forty-eight (48) months.

Each client reference should include the following information:

- Organization Name
- Type of Organization
- Organization Address

- Contact Name
- Contact Title
- Contact Phone Number
- Contact E-Mail Address
- Equipment Make and Model
- Equipment Installation Date

RFP Timeline:

September 14, 2023 RFP released to perspective Vendors

September 14th through October 18th Vendor information request and response period.

October 19, 2023 11:00am RFPs are due

October 20th through November 15th Vendor proposal review and consideration by Town of Carmel

RFP Modifications:

Modifications or changes to this RFP may only be issued in writing or via e-mail by issuing an addendum to this document. If a provision in this RFP is in error or will preclude a Vendor from submitting a proposal, the Vendor may request in writing or via e-mail that the provision(s) be changed. The request will be reviewed and if the requested change will not materially alter the finished system or affect the Town in any negative way, it will be granted and all potential Vendors will be issued an addendum to this RFP.

Proposal Submission:

Proposals should be submitted as complete responses to this RFP and should include all items requested herein.

The pricing contained in each vendors proposal must be held for a period of 100 days from the proposal submission date.

Proposals received without the required information will be marked as incomplete and will not be considered in this RFP process.

Completed proposals should be placed in a sealed envelope marked Town of Carmel 2023 Copy Machine Replacements. The envelope should be delivered or mailed to the below listed Submission Contact and received no later than **11:00am on October 19, 2023. Proposals can also be emailed.**

Mary Ann Maxwell, Town Comptroller Email: mam@ci.carmel.ny.us
and/or Anne Pasquerello, Chief of Staff Email: amp2@ci.carmel.ny.us

**Carmel Town Hall
60 McAlpin Avenue
Mahopac, NY 10541
Telephone 845-628-1500**

CONTRACT AWARD

Award

Award of this contract will be based upon a review and analysis of all vendor proposals. The ability of a particular vendor to meet all the needs at all locations as well as a vendor's past performance will weigh heavily in the decision-making process.

Contract Execution

The successful vendor in this RFP process will be required to enter into a binding contract with the Town, based on the requirements of this RFP and Town's standard terms and conditions.

Within 5 days' notice of contract award, the successful vendor will deliver to the Town a draft contract for review. This draft should include a detailed delivery and implementation schedule for each location based on the expiration date of each lease as provided beginning on page 5 of this document.

Terms and conditions of this draft which do not comply with all requirements of this RFP, which are in opposition to Town policies or which are contrary to the best interests of the Town, will not be accepted.

The draft may not contain any provisions for automatic lease renewal or for required notifications (other than intent to purchase) on the part of the Town.

If the equipment is to be leased, the draft contract must contain a provision for the Vendor to pickup the equipment from the Town at no additional charge at the end of the lease.

The Town does not make advanced payments on work not yet performed or materials not delivered.

Prior to the execution of the contract, the Vendor will be required to post certificates of insurance meeting the Town's insurance requirements for contracts of this type and naming the Town as a beneficiary in the event of a loss. Specifics of these insurance requirements are listed on pages 16 and 17 of this document.

**TOWN OF CARMEL
BUDGET REVISIONS JUNE - AUGUST 2023 #2023/04**

9/13/2023 Work Session Agenda Item #2

BUDGET REVISION NUMBER	ACCOUNT	ACCOUNT TITLE & TRANSFER DESCRIPTION	INCREASE USES & SOURCES OF FUNDS	DECREASE USES & SOURCES OF FUNDS
GENERAL FUND				
1	100.1110.0019	JUSTICE COURT OTHER COMPENSATION	1,343.00	
	100.1989.9877	FUND BALANCE FOR COMPENSATED ABSENCES	*	1,343.00
		- PROVIDE FOR PAYOUT OF ACCRUED VACATION TIME		
2	100.3120.0011	POLICE STAFF UNIFORM	100,000.00	
	100.3120.0019	POLICE STAFF OTHER COMPENSATION	218,548.00	
	100.1989.9877	FUND BALANCE FOR COMPENSATED ABSENCES	*	218,548.00
	100.1989.9909	APPROPRIATED FUND BALANCE	*	100,000.00
		- PROVIDE FOR RETIREMENT INCENTIVE AND PAYOUT OF ACCRUED TIME FOR 2 POLICE DEPT RETIREES		
3	100.3120.0024	POLICE ACCIDENT REPAIRS	4,452.00	
	100.1989.2681	INSURANCE RECOVERY - ASSET	*	4,452.00
		- PROVIDE FOR POLICE VEHICLE REPAIRS FROM INSURANCE CLAIM		
4	100.3120.0027	POLICE OTHER EQUIPMENT	751.00	
	100.1989.2681	INSURANCE RECOVERY - ASSET	*	751.00
		- PROVIDE FOR LICENSE PLATE READER REPAIRS FROM INSURANCE CLAIM		
5	100.3123.0040	COMMUNITY POLICE EXPENSES	1,800.00	
	100.1989.1520	POLICE FEES	*	1,800.00
		- PROVIDE FOR COST OF POLICE YOUTH CAMP FROM REGISTRATION FEES		
6	100.7110.0040	PARK CONTRACTUAL EXPENSES	5,000.00	
	100.7140.0013	PLAYGROUND AND RECREATION TEMPORARY STAFF	29,000.00	
	100.7310.0040	YOUTH CONTRACTUAL EXPENSES	8,000.00	
	100.1989.2001	PARK AND RECREATION FEES	*	42,000.00
		- PROVIDE FOR TEMPORARY STAFF AND YOUTH EXPENSES FROM REVENUE RECEIVED		
7	100.7116.0040	VOLZ PARK CONTRACTUAL EXPENSES	3,900.00	
	100.1989.3041	STATE AID - OTHER GOVERNMENT	*	3,900.00
		- PROVIDE FOR VOLZ PARK TRAILS IMPROVEMENTS FROM ANTICIPATED 50/50 HUDSON RIVER VALLEY LAND TRAIL GRANT		
8	100.1620.0021	BUILDING MOTOR VEHICLE REPAIRS	2,000.00	
	100.1620.0047	BUILDING REFUSE EXPENSE	1,200.00	
	100.1620.0040	BUILDING CONTRACTUAL EXPENSES		3,200.00
		-TRANSFER FOR VEHICLE REPAIRS AND AN INCREASE IN COST OF TRASH REMOVAL AT TOWN HALL		
9	100.1680.0040	INFORMATION TECH CONTRACTUAL EXPENSE	7,000.00	
	100.1990.0040	CONTINGENT ACCOUNT		7,000.00
		- TRANSFER FOR INCREASED COST OF ANTI-VIRUS SOFTWARE FROM CONTINGENT LINE		
10	100.1680.0042	INFORMATION TECH WEB SITE EXPENSE	8,900.00	
	100.1990.0040	CONTINGENT ACCOUNT		8,900.00
		- TRANSFER FOR COST OF EVERBRIDGE (PUBLIC COMMUNICATION SERVICES) FROM CONTINGENT LINE		
11	100.1680.0044	INFORMATION TECH CONSULTANT	7,500.00	
	100.1990.0040	CONTINGENT ACCOUNT		7,500.00
		- TRANSFER FOR INCREASED COST OF TECHNOLOGY CONSULTANT FROM CONTINGENT LINE		
12	100.3120.0012	POLICE STAFF OVERTIME	110,000.00	
	100.3120.0013	POLICE STAFF TEMPORARY		10,000.00
	100.3120.0011	POLICE STAFF UNIFORM		100,000.00
		- TRANSFER FOR POLICE OT EXPENSE		
13	100.3120.0047	POLICE CONFERENCES/TRAINING EXPENSE	65,000.00	
	100.3120.0081	POLICE RETIREMENT UNIFORM		65,000.00
		- TRANSFER FOR CONFERENCE/TRAINING EXPENSE		
14	100.3121.0012	LAKE PATROL STAFF OVERTIME	25,000.00	
	100.3120.0081	POLICE RETIREMENT UNIFORM		25,000.00
		- TRANSFER FOR LAKE PATROL OT EXPENSE		

**TOWN OF CARMEL
BUDGET REVISIONS JUNE - AUGUST 2023 #2023/04**

BUDGET REVISION NUMBER	ACCOUNT	ACCOUNT TITLE & TRANSFER DESCRIPTION		INCREASE USES & SOURCES OF FUNDS	DECREASE USES & SOURCES OF FUNDS
15	100.3124.0011	POLICE K-9 STAFF		1,500.00	
	100.3124.0012	POLICE K-9 STAFF OVERTIME		6,500.00	
	100.3124.0082	POLICE K-9 STAFF FICA/MED EXP		1,000.00	
	100.3120.0081	POLICE RETIREMENT UNIFORM			7,200.00
	100.3120.0083	POLICE WORKMANS COMP			1,800.00
		- TRANSFER FOR K-9 STAFF EXPENSE			
16	100.5182.0042	EV CHARGERS UTILITY EXPENSE		3,000.00	
	100.5182.0040	STREET LIGHTING UTILITIES			3,000.00
		- TRANSFER FOR EV CHARGERS ELECTRICITY EXPENSES			
17	100.7020.0012	RECREATION ADMIN STAFF OVERTIME		6,000.00	
	100.7020.0040	RECREATION ADMIN CONTRACTUAL EXPENSES		2,000.00	
	100.7020.0044	RECREATION BLDG CONCESSION EXPENSES		100.00	
	100.7020.0049	RECREATION ADMIN MISC EXPENSES		2,000.00	
	100.7112.0020	MCDONOUGH FIELDS EQUIPMENT		100.00	
	100.7112.0040	MCDONOUGH FIELDS CONTRACTUAL EXPENSES		8,000.00	
	100.7115.0040	AIRPORT PARK CONTRACTUAL EXPENSES		500.00	
	100.7116.0040	VOLZ PARK CONTRACTUAL EXPENSES		3,800.00	
	100.7020.0013	RECREATION ADMIN TEMPORARY STAFF			7,900.00
	100.7020.0045	RECREATION BLDG SPECIAL REPAIRS			4,100.00
	100.7115.0020	AIRPORT PARK EQUIPMENT			500.00
	100.7180.0013	BEACH TEMPORARY STAFF			10,000.00
			- TRANSFER FOR MISC RECREATION EXPENSES		
HIGHWAY FUND					
18	500.5110.0012	GENERAL REPAIR STAFF OVERTIME		25,000.00	
	500.5110.0045	GENERAL REPAIR CONTRACTED CAPTL IMPROVEMENTS		45,000.00	
	500.5010.4321	FEDERAL AID - FEMA	*	70,000.00	
		- PROVIDE FOR JULY STORM RELATED COSTS - FEMA			
19	500.5112.0012	CHIPS OVERTIME EXPENSE			21,000.00
	500.5112.0020	CHIPS CONTRACT EXPENDITURES		65,800.00	
	500.5112.0082	CHIPS SOCIAL SECURITY EXPENSE			4,678.00
	500.5010.3502	CHIPS STATE AID - CAPITAL	*	40,122.00	
		- PROVIDE FOR HIGHWAY PROJECT COSTS FROM INCREASE IN CHIPS FUNDING			
20	500.5110.0040	GENERAL REPAIR CONT EXPENSE		2,691.00	
	500.5130.0041	MACHINERY CAPITAL EXPENSE		9,164.00	
	500.5010.2300	SERVICE TO OTHER GOVTS	*	11,855.00	
		- PROVIDE FOR HIGHWAY PROJECT COSTS FROM REVENUE FROM OTHER SPECIAL DISTRICT PROJECTS			
21	500.5130.0041	MACHINERY REPAIR CAPITAL EXPENSE		2,255.00	
	500.5010.2650	SALE OF SCRAP AND MATERIALS	*	2,255.00	
		- PROVIDE FOR THE PURCHASE OF CAPITAL MACHINERY FROM THE SALE OF RETIRED VEHICLES			
22	500.5148.0040	SERVICE FOR OTHER GOVERNMENTS		3,823.00	
	500.5010.2681	INSURANCE RECOVERY - ASSET	*	3,823.00	
		- PROVIDE FOR HIGHWAY VEHICLE REPAIRS FROM INSURANCE CLAIM			
23	500.5148.0040	SERVICE FOR OTHER GOVERNMENTS		12,155.00	
	500.5010.2681	INSURANCE RECOVERY - ASSET	*	12,155.00	
		- PROVIDE FOR HIGHWAY BOOM TRUCK REPAIRS FROM INSURANCE CLAIM			
24	500.5140.0049	OTHER EXPENDITURES		3,000.00	
	500.5140.0040	WEEDS AND BRUSH EXPENSE			3,000.00
		- TRANSFER FOR MISC WEEDS AND BRUSH EXPENSES			

**TOWN OF CARMEL
BUDGET REVISIONS JUNE - AUGUST 2023 #2023/04**

BUDGET REVISION NUMBER	ACCOUNT	ACCOUNT TITLE & TRANSFER DESCRIPTION	INCREASE USES & SOURCES OF FUNDS	DECREASE USES & SOURCES OF FUNDS
LAKE CASSE PARK DISTRICT				
25	401.7140.0047	REFUSE DISPOSAL	500.00	
	401.7140.0040	CONTRACTUAL EXPENSES		500.00
		-TRANSFER FOR INCREASE IN COST OF TRASH REMOVAL		
TEAKETTLE LAKE PARK DISTRICT				
26	403.7140.0040	CONTRACTUAL EXPENSE	3,000.00	
	403.7140.0099	REPAIR RESERVE		3,000.00
		- TRANSFER FOR BRUSH TRIMMING SERVICES		
CARMEL WATER DISTRICT #2				
27	602.8310.0047	EMERGENCY REPAIRS	50,000.00	
	602.8310.0048	OTHER OPERATING EXPENSES	20,000.00	
	602.8310.0090	CONTINGENCY		60,000.00
	602.8310.0099	REPAIR RESERVE		10,000.00
		-TRANSFER FOR EMERGENCY REPAIRS AND DISTRICT EXPENSES		
CARMEL WATER DISTRICT #3				
28	603.8310.0048	OTHER OPERATING EXPENSES	8,000.00	
	603.8310.0099	REPAIR RESERVE		8,000.00
		-TRANSFER FOR DISTRICT EXPENSES		
CARMEL WATER DISTRICT #4				
29	604.8310.0048	OTHER OPERATING EXPENSES	4,000.00	
	604.8310.0040	CONTRACTUAL EXPENSES		4,000.00
		-TRANSFER FOR DISTRICT EXPENSES		
CARMEL WATER DISTRICT #5				
30	605.8310.0048	OTHER OPERATING EXPENSES	2,000.00	
	605.8310.0047	EMERGENCY REPAIRS	4,590.00	
	605.8310.0040	CONTRACTUAL EXPENSES		2,000.00
	605.8310.0099	REPAIR RESERVE		4,590.00
		-TRANSFER FOR DISTRICT EXPENSES AND EMERGENCY REPAIRS		
CARMEL WATER DISTRICT #6				
31	606.8310.0048	OTHER OPERATING EXPENSES	6,500.00	
	606.8310.0040	CONTRACTUAL EXPENSES		1,000.00
	606.8310.0099	REPAIR RESERVE		5,500.00
		-TRANSFER FOR DISTRICT EXPENSES		
CARMEL WATER DISTRICT #7				
32	607.8310.0048	OTHER OPERATING EXPENSES	2,400.00	
	607.8310.0047	EMERGENCY REPAIRS	5,100.00	
	607.8310.0099	REPAIR RESERVE		7,500.00
		-TRANSFER FOR DISTRICT EXPENSES		
CARMEL WATER DISTRICT #8				
33	608.8310.0041	CHEMICALS	1,900.00	
	608.8310.0047	EMERGENCY REPAIRS	14,000.00	
	608.8310.0020	EQUIPMENT		1,900.00
	608.8310.0040	CONTRACTUAL EXPENSES		6,500.00
	608.8310.0090	CONTINGENCY		7,500.00
		-TRANSFER FOR CHEMICAL COSTS AND EMERGENCY REPAIRS		

**TOWN OF CARMEL
BUDGET REVISIONS JUNE - AUGUST 2023 #2023/04**

BUDGET REVISION NUMBER	ACCOUNT	ACCOUNT TITLE & TRANSFER DESCRIPTION	INCREASE USES & SOURCES OF FUNDS	DECREASE USES & SOURCES OF FUNDS
CARMEL WATER DISTRICT #9				
34	609.8310.0020	EQUIPMENT	11,103.76	
	609.8310.0047	EMERGENCY REPAIRS	5,190.00	
	609.8310.2681	INSURANCE RECOVERY - ASSET	*	16,293.76
		- PROVIDE FOR EMERGENCY PUMP REPLACEMENT FROM INSURANCE CLAIM		
35	609.8310.0020	EQUIPMENT	3,000.00	
	609.8310.0040	CONTRACTUAL	2,500.00	
	609.8310.0048	OTHER OPERATING EXPENSES	3,000.00	
	609.8310.0090	CONTINGENCY		8,500.00
		-TRANSFER FOR DISTRICT EXPENSES		
CARMEL WATER DISTRICT #10				
36	610.8310.0041	CHEMICALS	1,500.00	
	610.8310.0099	REPAIR RESERVE		1,500.00
		- TRANSFER FOR THE PURCHASE OF CHEMICALS		
CARMEL WATER DISTRICT #12				
37	612.8310.0048	OTHER OPERATING EXPENSES	4,000.00	
	612.8310.0020	EQUIPMENT		4,000.00
		-TRANSFER FOR DISTRICT EXPENSES		
CARMEL WATER DISTRICT #13				
38	613.8310.0020	EQUIPMENT	9,000.00	
	613.8310.0041	CHEMICALS	1,000.00	
	613.8310.0040	CONTRACTUAL EXPENSE		3,600.00
	613.8310.0099	REPAIR RESERVE		6,400.00
		- TRANSFER FOR GENERATOR PURCHASE AND DISTRICT EXPENSES		
CARMEL WATER DISTRICT #14				
39	614.8310.0048	OTHER OPERATING EXPENSES	2,760.00	
	614.8310.0020	EQUIPMENT		1,000.00
	614.8310.0041	CHEMICALS		350.00
	614.8310.0047	EMERGENCY REPAIRS		1,200.00
	614.8310.0099	REPAIR RESERVE		210.00
		-TRANSFER FOR DISTRICT EXPENSES		
CARMEL SEWER DISTRICT #2				
40	702.8130.0040	CONTRACTUAL EXPENSE	30,000.00	
	702.8130.0120	MICRO EQUIPMENT	8,000.00	
	702.8130.0140	MICRO CONTRACTUAL EXPENSES		8,000.00
	702.8130.0099	REPAIR RESERVE		30,000.00
		- TRANSFER FOR PURCHASE OF UV BULBS		
CARMEL SEWER DISTRICT #3				
41	703.8130.0040	CONTRACTUAL EXPENSE	4,000.00	
	703.8130.0042	UTILITIES	1,000.00	
	703.8130.9909	APPROPRIATED FUND BALANCE	*	5,000.00
		- PROVIDE FOR CONTRACTUAL EXPENSES AND UTILITY EXPENSES		
CARMEL SEWER DISTRICT #4				
42	704.8130.0040	CONTRACTUAL EXPENSE	15,000.00	
	704.8130.0120	MICRO EQUIPMENT	55,000.00	
	704.8130.0090	CONTINGENCY		20,000.00
	704.8130.2770	OTHER REVENUE	*	50,000.00
		- PROVIDE AND TRANSFER FOR EMERGENCY PURCHASE OF SCADA COMPUTER AND AIR COMPRESSORS		

**TOWN OF CARMEL
BUDGET REVISIONS JUNE - AUGUST 2023 #2023/04**

BUDGET REVISION NUMBER	ACCOUNT	ACCOUNT TITLE & TRANSFER DESCRIPTION	INCREASE USES & SOURCES OF FUNDS	DECREASE USES & SOURCES OF FUNDS
<u>CARMEL SEWER DISTRICT #8</u>				
43	708.8130.0048	OTHER OPERATING EXPENSES	700.00	
	708.8130.0040	CONTRACTUAL REPAIRS		700.00
		-TRANSFER FOR DISTRICT EXPENSES		
<u>TOWN DRAINAGE CAPITAL PROJECT</u>				
44	900.1989.0040	CONTRACTUAL EXPENSES	6,018.00	
	900.1989.0012	PROJECT LABOR OVERTIME		298.00
	900.1989.0048	OTHER PROJECT EXPENSES		5,191.00
	900.1989.0080	FICA/MED BENEFIT EXP		529.00
		- TRANSFER CAPITAL PROJECT COST		
<u>CARMEL WATER DISTRICT #2 CAPITAL PROJECT</u>				
45	962.8310.0044	ENGINEERING EXPENSE	60,000.00	
	962.8310.0048	OTHER PROJECT EXPENSE		60,000.00
		- TRANSFER CAPITAL PROJECT COST		
<u>CARMEL WATER DISTRICT #9 CAPITAL PROJECT</u>				
46	969.8310.0044	ENGINEERING EXPENSE	1,500.00	
	969.8310.0048	OTHER PROJECT EXPENSE		1,500.00
		- TRANSFER CAPITAL PROJECT COST		

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: September 5, 2023

Re: Emergency Repairs/Services

This memorandum is being presented to the Town Board to advise the Board of emergency invoices that were submitted for payment/authorization to proceed in excess of \$10,000.00 for services rendered. The following provides a brief a summary of the work that was performed.

- Carmel Water District 4

On August 17, 2023 Bee and Jay, the operators for CWD 4 notified the Engineering Department that the one (1) of the two (2) booster pumps at CWD 4 was leaking. This piece of equipment is ~ 11 years old. The water treatment plant uses both booster pumps.

Attached please find an invoice from Bee and Jay, in the amount of \$11,303.00, for the spare booster ESV booster pump. The intent is place the new pump into service so that original pump can be repaired and used as a spare.

There are sufficient funds in the budget as this expense was included as part of the 2023 operating budget.

- Carmel Water District 5

On August 1, 2023 Bee and Jay, the operators for CWD 5 notified the Engineering Department that the well pump for well 3 had failed. The failure was due to a lightning strike. Note that this is the highest producing well for the water district. Attached please find an invoice from Bee and Jay, in the amount of \$16,195.00, for the new well pump and installation.

09-05-2023

Emergency Repairs/Services

There are sufficient funds in the budget for this expense, the Board should note that the well pump failed due to a lightning storm and will be submitted to the insurance company for reimbursement.

- Carmel Water District 6

On August 18, 2023 Bee and Jay, the operators for CWD 6 notified the Engineering Department that the variable frequency drives (VFDs) for booster pumps 1 and 2 had failed. The failure was due to a lightning strike. Attached please find an invoice from Bee and Jay in the amount of \$14,160.00, for the replacement and install of new VFDs

There are sufficient funds in the budget for this expense, the Board should note that the well pump failed due to a lightning storm and will be submitted to the insurance company for reimbursement.



P.O. Box 78 - 719 Route 6 - Mahopac, NY 10541
 p: 845.628.3924 f: 845.628.4062
 e: service@beeandjay.com

INVOICE

DATE	INVOICE #
8/22/2023	105693

www.BEEANDJAY.com

BILL TO:

Town of Carmel- CWD 4
 Engineering Dept.
 60 McAlpin Ave.
 Mahopac, NY 10541

SERVICE LOCATION:

Kennard Road Pump Station
 Mahopac, NY

PROFESSIONAL SERVICE 59 YEARS 1964-2023

Master Plumbers Lic.#s W.C. 556 P.C. 30289

CUSTOMER #	TERMS	MECHANIC	SERVICE DATE	WORK ORDER #
845-628-2087	Payment Due Upon Rec		8/17/2023	54171
ITEM	QTY/HRS	DESCRIPTION	RATE	AMOUNT
Description		Delivered spare booster ESV booster pump and motor to pump station		
Material		Material Only - 1 Spare Goulds ESV Booster Certificate on File	11,303.00 0.00%	11,303.00T 0.00

** Invoices not paid when due will be subjected to a finance charge of 1.5% per month

Total Due \$ 11,303.00

WE ACCEPT ALL MAJOR CREDIT CARDS !!

CARD TYPE: VISA MASTERCARD AMERICAN EXPRESS DISCOVER DINER'S CLUB OTHER _____

CARDHOLDER/NAME: _____ SIGNATURE: _____

CARD# _____ EXP. DATE: _____ CID # _____

EMAIL: _____

EXHIBIT "B"

**Emergency Justification Form
Town of Carmel Procurement Policy**

Procurement Policy, Section VI: Emergency Procurement

Subdivision (4) of General Municipal Law §103 sets forth an exception to purchasing and bidding requirements for emergency situations

Department: Engineering

Vendor names: Bee and Jay

Nature of emergency: CWD4, Emergency Purchase of Spare Booster Pump

Estimated cost: \$11,303.00

There are three basic statutory criteria to be met in order to fall within the emergency purchase exception. State the basis for identifying an emergency purchase or service, check any that apply:

- The situation arose out of an accident or unforeseen occurrence or condition.
- Public buildings, public property, or the life, health, safety or property of the political sub-division's residents were affected.
- The situation required immediate action, which could not await competitive bidding.

The emergency purchases or services exceeded **\$10,000** and will be submitted to the Town Board for presentation at a Town Board Meeting to acknowledge said emergency. A Town Board Resolution should be passed acknowledging the same.

- Other (provide explanation):

Purchasing Agent's signature for approval: _____



Department Head's signature for approval: _____



EXHIBIT "B"

**Emergency Justification Form
Town of Carmel Procurement Policy**

Procurement Policy, Section VI: Emergency Procurement

Subdivision (4) of General Municipal Law §103 sets forth an exception to purchasing and bidding requirements for emergency situations

Department: Engineering

Vendor names: Bee and Jay

Nature of emergency: Pump Replacement due to Storm Damage ***Insurance

Estimated cost: \$16,195.00

There are three basic statutory criteria to be met in order to fall within the emergency purchase exception. State the basis for identifying an emergency purchase or service, check any that apply:

The situation arose out of an accident or unforeseen occurrence or condition.

Public buildings, public property, or the life, health, safety or property of the political sub-division's residents were affected.

The situation required immediate action, which could not await competitive bidding.

The emergency purchases or services exceeded **\$10,000** and will be submitted to the Town Board for presentation at a Town Board Meeting to acknowledge said emergency. A Town Board Resolution should be passed acknowledging the same.

Other (provide explanation):

Purchasing Agent's signature for approval: _____



Department Head's signature for approval: _____





P.O. Box 78 - 719 Route 6 - Mahopac, NY 10541
 p: 845.628.3924 f: 845.628.4062
 e: service@beeandjay.com

INVOICE

DATE	INVOICE #
8/24/2023	105718

www.BEEANDJAY.com

BILL TO:

Town of Carmel- CWD 5
 Engineering Dept.
 60 McAlpin Ave.
 Mahopac, NY 10541

SERVICE LOCATION:

Town of Carmel- CWD 5
 Myrtle Ave Booster Station
 Mahopac, NY

PROFESSIONAL SERVICE 59 YEARS 1964-2023

Master Plumbers Lic.#s W.C. 556 P.C. 30289

CUSTOMER #	TERMS	MECHANIC	SERVICE DATE	WORK ORDER #	
845 628 2087	Due Upon Receipt	G	8/1/2023	64280	
ITEM	QTY/HRS	DESCRIPTION		RATE	AMOUNT
Description		Responded to service call of 8/1/23 CWD #5 Myrtle Ave Pump Station -Well #3 storm damage alarm. Reset controls to boosters and faults on Well #3 tested. Burnout due to the power surge. Ordered replacement 5 HP pump and motor. 8/23/23 Pulled and replaced all 5HP submersible pump motor. Sub cable and all related parts with boom truck and restored into system.			
Material		1 Gould 25 S End		2,347.00	2,347.00
Material		1 Gould HP 230VMotor		2,340.00	2,340.00
Material		2 1 1/4 Line Checks		236.00	236.00
Material		500 feet 8-SWB Cable		2,860.00	2,860.00
Material		500 feet 1 1/4 set 120 Pipe		3,840.00	3,840.00
Material		1 1/ Wire Guides		55.00	55.00
Material		1 Torque Arrester		45.00	45.00
Material		8 Rolls Tape		48.00	48.00
Material		2 Sets of heat shrinks		44.00	44.00
Boom Truck		Boom Truck		1,500.00	1,500.00
Labor TOC Tech	8	1- Tech Plb		185.00	1,480.00
Labor TOC Mech	8	1- Mech Plb		175.00	1,400.00

** Invoices not paid when due will be subjected to a finance charge of 1.5% per month

Total Due \$16,195.00

WE ACCEPT ALL MAJOR CREDIT CARDS !!

CARD TYPE: VISA MASTERCARD AMERICAN EXPRESS DISCOVER DINER'S CLUB OTHER _____

CARDHOLDER/NAME: _____ SIGNATURE: _____

CARD# _____ EXP. DATE: _____ CID # _____

EMAIL: _____

EXHIBIT "B"

**Emergency Justification Form
Town of Carmel Procurement Policy**

Procurement Policy, Section VI: Emergency Procurement

Subdivision (4) of General Municipal Law §103 sets forth an exception to purchasing and bidding requirements for emergency situations

Department: Engineering

Vendor names: Bee and Jay

Nature of emergency: CWD6 Pump Replacement due to Power Surge ***Insurance

Estimated cost: \$14,160.00

There are three basic statutory criteria to be met in order to fall within the emergency purchase exception. State the basis for identifying an emergency purchase or service, check any that apply:

The situation arose out of an accident or unforeseen occurrence or condition.


Public buildings, public property, or the life, health, safety or property of the political sub-division's residents were affected.

The situation required immediate action, which could not await competitive bidding.

The emergency purchases or services exceeded **\$10,000** and will be submitted to the Town Board for presentation at a Town Board Meeting to acknowledge said emergency. A Town Board Resolution should be passed acknowledging the same.

Other (provide explanation):

Purchasing Agent's signature for approval: 

Department Head's signature for approval: 



P.O. Box 78 - 719 Route 6 - Mahopac, NY 10541
 p: 845.628.3924 f: 845.628.4062
 e: service@beeandjay.com

INVOICE

DATE	INVOICE #
8/22/2023	105692

www.BEEANDJAY.com

BILL TO:

Town of Carmel- CWD 6
 Engineering Dept.
 60 McAlpin Ave.
 Mahopac, NY 10541

SERVICE LOCATION:

Shell Valley Pump Station
 Tanya Lane
 Mahopac, NY

PROFESSIONAL SERVICE 59 YEARS 1964-2023

Master Plumbers Lic.#s W.C. 556 P.C. 30289

CUSTOMER #	TERMS	MECHANIC	SERVICE DATE	WORK ORDER #
845 628 2087	Due Upon Receipt	TK	8/18/2023	68911
ITEM	QTY/HRS	DESCRIPTION	RATE	AMOUNT
Description		CWD# 6 Shell Valley Pump Station - VFD controller replacements of booster #1 & #2 due to power surge damage- Removed existing two VFD drives, rewired both units, set up, calibrated and tested with Jem Eng Service		0.00
Labor TOC Tech	4	1- Tech Plb	185.00	740.00
Labor TOC Tech	4	1- Tech Plb	185.00	740.00
Professional Serv.		Jem Eng. Service	950.00	950.00
Material		2- VFD IPC Drive Controllers	11,730.00	11,730.00
			Total Due	\$14,160.00

** Invoices not paid when due will be subjected to a finance charge of 1.5% per month

WE ACCEPT ALL MAJOR CREDIT CARDS !!

CARD TYPE: VISA MASTERCARD AMERICAN EXPRESS DISCOVER DINER'S CLUB OTHER _____

CARDHOLDER/NAME: _____ SIGNATURE: _____

CARD# _____ EXP. DATE: _____ CID # _____

EMAIL: _____

PEOPLE



D & S PUMP AND SUPPLY COMPANY, INC.

WHOLESALE ONLY

MAIN OFFICE:
3784 DANBURY RD.
BREWSTER, NY 10509
(845) 279-3765
FAX (845) 279-5535

OTHER LOCATIONS:
WILLIMANTIC, CT. (860) 456-3731
RHINEBECK, N.Y. (845) 876-3071
MIDDLETOWN, N.Y. (845) 692-3200
HARRISVILLE, R.I. (401) 568-3334
HUDSON, N.H. (603) 598-8448
GREENFIELD, MA. (413) 772-0032
WHITEVILLE, N.C. (910) 641-0909

DOMESTIC-INDUSTRIAL-COMMERCIAL
WATER SYSTEMS & CONDITIONING EQUIPMENT

ORDER NO.	QUOTE
ORDER DATE	08/02/23

TIME: 11:17

PAGE: 1

S
O
L
D

000100

BEE & JAY PLB & HTG

719 ROUTE 6
MAHOPAC, NY 10541
845 628-3924

JOB NAME
DELIVER TO: *CWS #6 SIBER VANKY*

```

*** * * *** *****
* * * * * * *
* * * * * * *
* * * * * * *
*** *****

```

ON AMOUNTS BEYOND 60 DAYS PAST DUE A 1 1/2% MONTHLY SERVICE CHARGE WILL BE MADE

SALESMAN NAME RALPH BROWN		DELIVERED BY	HOW SHIPPED		WRITTEN BY	
TERMS 2% 10th NET 30		PULLED BY	CUSTOMER ORDER #		DATE SHIPPED	
ITEM NUMBER	DESCRIPTION	QTY ORDERED	QTY SHIPPED	B.O.	U/M	PRICE
IPC DRIVE	AVA20150A0FOXOX1	2			0	11730.00
ALL PRICES SHOWN ARE SUGGESTED RETAIL						
					MDSE TOT:	11730.00
RECEIVED BY:						

ORIGINAL




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: August 28, 2023

Re: Professional Planning Consulting Services - RFP 2023-003

Request for Proposals (RFPs) were solicited for the referenced services on July 20, 2023. A copy of the RFP along with the proposer list and New York State Bid Net Solicitation Document report are attached. The request was to engage the services of a professional planning consultant to support Planning, Building, and Engineering Department staff in the review of residential, commercial and redevelopment applications and providing recommendations for the Town's Planning Board, Zoning Board of Appeals, and Town Board, as required.

The RFP identified that the contract would be effective for three (3) years from January 1, 2024 through to December 31, 2026 with the unilateral option on the part of the Town of Carmel to extend the term for two (2) additional one (1) year periods (2027 and 2028) respectively.

The scope of work identified in the RFP is as follows:

1. Attendance and presentations at Planning Board meetings. These are scheduled two (2) times a month on the first and third Wednesday of the month
2. Attendance at Zoning Board of Appeals and Town Board meetings, as requested.
3. Make appropriate presentations before the Planning Board at each meeting, and the Zoning Board of Appeals, and /or Town Board upon request or as needed.
4. Review, research and make written recommendations on all site plans, special uses, subdivisions, land divisions, plats, site condominiums, re-zonings and other related matters prior to action by the Planning Board and/or Town Board.
5. Prepare documentation which includes, but is not limited to, the following:
 - a. Code conflicts from applications submitted to the Planning and other departments,
 - b. Determination of Completeness
 - c. New York State Environmental Review Quality Act (SERQA) Determinations, Findings, Public Hearing Notification
 - d. Correspondence, memoranda, and special reports; and
 - e. Resolutions
6. Review plans and accompanying documentation for compliance with the Town Planning and Zoning Ordinances, State Planning, Zoning and Subdivision Laws, and SEQRA. They will also apply their knowledge of the principles of good planning practice to their assigned projects
7. Advise, assist and coordinate with the Planning Board, Zoning Board of Appeals, Town Board, Town Engineer, Attorney and/or Town officials in matters dealing with State laws or ordinances, procedures or practices relating to planning, zoning and development.
8. Prepare Town Ordinance Text Amendments as requested.
9. Be available for routine questions from the public regarding planning or procedural issues.

August 28, 2023

Professional Planning Consulting Services - RFP 2023-005

10. Work with the Planning Board and Town Boards on periodic reviews of the comprehensive plan update and code revisions.
11. Provide specialized planning services as requested. (i.e. Parks and Recreation, etc.)
12. Provide regular office hours in Town Hall to conduct pre-submission meetings with applicants and to coordinate directly with Town staff.

The RFP required that proposers provide a total cost with a proposed budget for the work.

Proposals were received by the Engineering office on August 24, 2023 and one (1) firm, Cleary Consulting, submitted. A copy of the proposal is attached and the cost provided for each year (i.e., 2024, 25, 26, 27 and 28) is \$70,000.00 per year.

Cleary consulting has adequately provided Planning Services to the Town of Carmel since 1995. Based on the costs and proposed scope of work we recommend that the Contract be awarded to Cleary Consulting as the most responsive firm to the Town's needs for this project.

We have advised the Comptroller's office of this expenditure and per the attached there are sufficient funds in the budget for this work as described.



Request for Proposal (RFP)

Provide Professional Planning Consulting Services

R2023-003

Issue Date: July 20, 2023

Due Date: 11:00 AM August 24, 2023

Town of Carmel Engineering Department
60 McAlpin Avenue
Mahopac, NY 10541

LEGAL NOTICE
REQUEST FOR PROPOSAL

NOTICE IS HEREBY GIVEN that sealed Requests for Proposal will be received at the Office of the Town Engineer, Town of Carmel, 60 McAlpin, Mahopac, New York 10541, until 11:00 AM on **August 24, 2023** for the following:

R2023-003
TOWN OF CARMEL
PUTNAM COUNTY, NEW YORK
PROFESSIONAL PLANNING CONSULTING SERVICES

Copies of the Request for proposal may be obtained at the Office of the Town Engineer, at the above address, beginning **July 20, 2023** between the hours of 8:30 AM - 4:30 PM, Monday through Friday.

Interested firms must submit their proposals in sealed envelopes marked "Town of Carmel Professional Planning Consulting Services" to the Town Engineer, Town of Carmel, 60 McAlpin Avenue, Carmel, NY 10541. Please contact the Town Engineer at 845-628-1500 for a copy of the RFP.

The Town Board of the Town of Carmel reserves the right to reject any and all submittals of proposals and abandon the proposal or may reject all submittals and re-advertise at a future date.

Richard Franzetti, Town Engineer

TABLE OF CONTENTS
Request for Proposal
Professional Planning Consulting Services

Section #	Description	Page Number
1.	Background	5
2.	Statement of Need.....	5
3.	Pre-Submission Questions and Other Procurement Information	7
4.	Description of Procurement Process	8
4.1	Town Rights and Options	8
4.2	Expense of Submittal Preparation.....	8
4.3	Information Disclosure to Third Parties.....	8
4.4	Questions/Clarifications Request.....	9
4.5	Equal Opportunity Requirements.....	9
5.	SUBMITTAL PROPOSAL	9
5.1	General Instructions and Submittal Deadline	9
5.2	Term of Agreement.....	10
5.3	Proposal and Technical Approach	10
5.3.1	Cover Letter	10
5.3.2	Required Standards	10
5.3.3	Qualifications	11
5.4	Technical Approach	11
6.	Review and Evaluation	12
6.1	Evaluation Criteria	13
6.2	Evaluation of Proposal.....	14
7.	Professional Liability Insurance.....	14
8.	Proposal Submission Sheet R2023-003 – Professional Planning Consulting Services	15

GENERAL INFORMATION FORM

QUESTIONS: All inquiries for information regarding this solicitation should be directed to:
 Richard J. Franzetti, P. E., Town Engineer
 Phone: (845) 628-2087
 e-mail: rjf@ci.carmel.ny.us

DEADLINE FOR QUESTIONS: August 15, 2023 11:00 AM

DUE DATE: Sealed Proposal Packages will be received until **August 24, 2023 at 11:00 AM.**

ADDRESS Proposals should be mailed or hand delivered to:
Town of Carmel Town Engineer
 60 McAlpin Avenue
 Mahopac, NY 10541
RE: R2023-003
Request for Professional Planning Consulting Services

COMPANY INFORMATION/SIGNATURE:

Full Legal Name (print)		Federal Taxpayer Number (ID#)	Contractor's Registration
Business Name / DBA Name / TA Name and Address		Payment Address	Purchase Order Address
Contact Name/Title		Signature (ink)	Date
Telephone Number	Fax Number	Toll Free Number	E-mail Address

Town of Carmel, New York
Comprehensive Plan and Code Revision

1. Background

The Town Board of the Town of Carmel (Town), is hereby soliciting sealed proposals from well-qualified professional planning consultant to comprehensively support Planning, Building, and Engineering Department staff in the review of residential, commercial and redevelopment applications, preparation of reports, and providing recommendations for the Town’s Planning Board, Zoning Board of Appeals, and Town Board, as required.

The selected consultant will work proactively with the Town and appropriate boards and/or commissions, as required, to ensure that the Town is utilizing best practices and good planning practice in its various land use procedures and controls.

Please note the Town has hired a consultant to start updates to the Towns Comprehensive Plan and Code revisions. The selected consultant will need to work with this contracted professional planning consultant that is preparing the update of the Town’s Comprehensive Plan and revisions to the existing Town Code.

The Town of Carmel, located approximately 60 miles from New York City, is 35.8 square miles in size and lies in south central Putnam County. The Town is the most populous municipality in the County, with an estimated 2017 population of 34,360. The Town is bisected on a northeast to southwest diagonal by NYS Route 6, which provides access to nearby I-84 and I-684. The Taconic Parkway runs along the northwestern edge of the Town. NYS Routes 6N, 52 and 301 provide arterial roadway access within the Town. The Town is bordered by the Towns of Putnam Valley to the west, Kent to the north, Patterson and Southeast to the east and Yorktown, Somers and North Salem in Westchester County to the south.

The Croton Watershed plays an important role in the Town’s affairs. Of the 22,937 acres within the Town boundaries, over 20,000 acres or 91% are Croton Watershed lands. Two major reservoirs serving New York City are located in Town; the West Branch and Croton Falls Reservoirs. Numerous other lakes and waterbodies serve to define the character of the Town, with Lake Mahopac serving as the focal point for the Mahopac hamlet and Lake Gleneida for the Carmel hamlet.

2. Statement of Need

The hired Consultant is expected to review the current Town Code, and in particular, current land use regulations, and to provide recommendations regarding the proposed comprehensive plan update and code revisions. The hired consultant should have an understating of the following:

- Existing conditions throughout the community, that include:
 - Community profile and demographics;
 - Land Use;
 - Zoning;
 - Natural Resources;
 - Transportation and mobility ;
 - Municipal Services;
 - Infrastructure;
 - Economic Resources; and
 - Historic and Cultural resources
- Residential zoning, both prior to the up-zoning of the early 2000’s as well as the existing single-district residential zoning,
- The Town’s hamlet and commercial zoning to ensure that the hamlets of Carmel and Mahopac are vibrant, well-designed and thriving.
- Institutional uses, golf courses, camps, the Putnam Hospital Center and the Putnam County government facilities, as well as those of the New York City Department of Environmental Protection (NYCDEP) located within the Town
- NYCDEP Watershed rules and regulations
- Town infrastructure network, including the following water districts:
 - Carmel Water District (CWD) #1 - Hamlet of Mahopac
 - CWD #2 - Hamlet of Carmel
 - CWD #3 - Lake Secor
 - CWD #4 - Lake Baldwin
 - CWD #5 - Maple Terrace
 - CWD #6 - Shell Valley, Tomahawk Creek
 - CWD #7 - Ivy Hills
 - CWD #8 - Mahopac Ridge
 - CWD #9 - Mahopac Hills – Simone
 - CWD #10 - Lakeview Park
 - CWD #12 - Farmview
 - CWD #13 - Rolling Greens
 - CWD #14 - Red Mills

And the following sewer districts:

- Carmel Sewer District (CSD) #1 - Hamlet of Mahopac
- CSD #2 - Hamlet of Carmel
- CSD # 3 - Hamlet of Mahopac
- CSD #4 - Lake Secor
- CSD #5 - Hillsdale
- CSD #6 - Ivy Hills
- CSD #7 - Buckshollow
- CSD #8 - Stoneleigh Ave., Putnam Hospital

- A generalized understanding of traffic operating conditions throughout the Town including Local, Putnam County and New York State DOT roadways,

3. Pre-Submission Questions and Other Procurement Information

Before submitting, each respondent shall (a) examine the RFP Documents thoroughly, (b) visit the Town to be familiar with local conditions that may in any manner affect cost, progress or performance of the Work, (c) be familiar with federal, state and local laws, ordinances, rules and regulations that may in any manner affect cost, progress or performance of the Work; and (d) study and carefully correlate observations with the RFP Documents.

All questions about the meaning or intent of the RFP Documents shall be submitted to the ENGINEER in writing. In order to receive consideration, questions must be received by the ENGINEER no later than by 11:00 AM August 15, 2023. Any interpretations of questions so raised, which in the opinion of the ENGINEER require interpretations, will be issued by Addenda emailed to all parties recorded by the ENGINEER as having received the RFP Documents for receipt not later than four days prior to the date fixed for the receipt of Proposals. The ENGINEER or OWNER will not be responsible for oral interpretations or clarifications which anyone presumes to make on their behalf.

Only emailed questions will be acknowledged. All correspondence shall be sent to:

Richard J. Franzetti P.E.
60 McAlpin Avenue
Mahopac , New York 10541
Phone: 845-628-2087
rjf@ci.carmel.ny.us

Contact with Town of Carmel officials (other than the Town Engineer) is not allowed and will be considered as grounds for disqualification from the selection process.

Copies of all questions and answers, and any addenda to supplement the RFP, will be sent by email to each respondent no later than four (4) days prior to the proposal due date. Only formal written responses to properly submitted questions will be binding.

4. Description of Procurement Process

4.1 Town Rights and Options

The Town, at its sole discretion, reserves the following rights:

- To supplement, add to, delete from and change this solicitation document;
- To determine which respondent, if any, should be selected for negotiations;
- To reject any or all qualifications, proposals or information received pursuant to this RFP;
- To supplement, amend, substitute or otherwise modify this RFP at any time;
- To cancel this RFP with or without the substitution of another RFP or pre-qualification process;
- To request additional data or information after the submittal date, if such data or information is considered pertinent, in the Town's sole view, to aid the review and selection process;
- To conduct investigations with respect to the qualifications and experience of each respondent;
- To take any action affecting the RFP or the services or facilities subject to this RFP that would be in the best interests of the Town;
- To require one or more respondents to supplement, clarify or provide additional information in order for the Town to evaluate the RFPs submitted;
- To waive any defect or technicality in any RFP received;
- To reject any portion of any submittal and/or reject all submittals, to waive any informalities or irregularities in the submittals or to re-advertise.

4.2 Expense of Submittal Preparation

The Town accepts no liability for the costs and expenses incurred by the respondents in responding to this RFP, preparing responses for clarification, attending interviews, participating in meetings and presentations required for the qualification process. Each respondent that enters into the procurement process shall prepare the required materials and submittals at its own expense and with the express understanding that they cannot make any claims whatsoever for reimbursement from the Town for the costs and expenses associated with the procurement process.

4.3 Information Disclosure to Third Parties

This RFP is a public document. By responding to this RFP, respondents waive any challenge to the Town's decisions in this regard.

If any submittal contains confidential technical, financial or other types of information, the respondent must clearly label the specific portions sought to be kept confidential and specify the exemption that the respondent is relying upon. Marking all, or substantially all of a response as confidential, may result in the response being considered non-responsive.

Notwithstanding the foregoing, respondents recognize and agree that the Town will not be responsible or liable in any way for any losses that the respondent may suffer from the disclosure of information or materials to third parties.

4.4 Questions/Clarifications Request

No interpretation or clarification of the meaning of any part of this RFP will be made orally to any respondent. Respondents must request such interpretation or clarification in writing from the Town.

Responses to all requests for information will be provided to all respondents to the RFP. Any and all such interpretations and supplemental instructions will be made in the form of written addenda which will be sent to all recipients of the RFP. Any such clarifications or addenda shall become part of this RFP.

4.5 Equal Opportunity Requirements

The selected respondent, in the performance of all services, will not discriminate on grounds of race, color, religious creed, national origin, age, sex or handicap in employment practices in the selection or retention of subcontractors, or in the procurement of materials and rentals of equipment.

5. SUBMITTAL PROPOSAL

5.1 General Instructions and Submittal Deadline

Respondents are requested to submit one (1) original and two (2) hardcopies and one (1) electronic copy of their proposals to:

Town of Carmel Town Engineer
60 McAlpin Avenue
Mahopac, NY 10541
RE: R2023-003
Professional Planning Consulting Services

Phone: 845-628-1500

Proposals are due on August 24, 2023 by 11:00 AM local time. No facsimile copies will be accepted. The package should be clearly labeled "Request for Proposal Town of Carmel Professional Planning Consulting Services."

5.2 Term of Agreement

This contract shall be effective for the term of three (3) years, commencing on or about January 1, 2024 and ending on or about December 31, 2026. The Town of Carmel Shall have the unilateral option, at the sole discretion of the Town of Carmel to extend the contract for up to two (2) additional twelve (12) month terms for years 2027 and 2028.

5.3 Proposal and Technical Approach

The Proposals and Technical Approach document must provide the following information and be organized into sections that include at least the following:

- Cover Letter;
- Required Standards;
- Qualifications;
- Technical Approach;
- Appendices (primarily for supporting financial information).

Narrative pages are to be 8½x11 inches and all materials shall be bound into one volume. A clear and concise presentation of information is encouraged.

Respondents are required to organize the information requested in this RFP in accordance with the format outlined. Failure of the respondent to organize the information required by this RFP as outlined may result in the Town, at its sole discretion, disqualifying the respondent from further consideration.

5.3.1 Cover Letter

The proposal must include a letter of transmittal attesting to its accuracy. The cover letter should provide the name, address, telephone and facsimile numbers and email address of the respondent along with the name, title, address, telephone and facsimile numbers and email address of the executive that has the authority to contract with the Town.

5.3.2 Required Standards

This section establishes standards of experience and financial capabilities that the Town of Carmel requires for a respondent to be considered qualified. The Town, at its sole discretion, will decide if a respondent meets the standards.

5.3.3 Qualifications

Respondents shall demonstrate their ability to undertake the Town's project by providing the technical qualifications of the respondent, individual team members and principal subcontractors, if applicable. The Town reserves the right to conduct an independent investigation of the respondent's technical qualifications by contacting project references, accessing public information, inspecting facilities or contacting independent parties. Additional information may be requested during the evaluations of technical qualifications. The respondent shall provide the following information to demonstrate its technical qualifications:

- **Company Profile:** The proposal must include the full name, tax identification number, main office address, telephone and email address of the respondent and the principal contact person. It shall include a description of the firm or organization (corporation, partnership, joint venture, sole proprietorship, etc.) that will serve as the contracting party. A project organization chart clearly delineating lines of authority within the organization is required. The history, ownership, organization and background of the respondent shall also be provided;
- If the respondent is a joint venture, the required information shall be submitted for each member of the joint venture firm. The respondent shall describe the history of the relationships among team members, including a description of past working relationships. If a sole proprietor or partnership, provide names of owners, partners or proprietors;
- Identify when the respondent was organized and, if a corporation, where incorporated and how many years engaged in providing contract operations, maintenance and management services under that name;
- Provide a description of the circumstances, if any, related to any Town of Carmel employee, Town Council member or other officer, employee or person who is payable in whole or in part from the Town of Carmel that has or had any direct or indirect personal interest in the respondent;
- **Relevant Project Experience/References:** The respondent shall provide its overall experience with the development of Comprehensive Plans.
- **Additional Capabilities:** The respondent should provide its capabilities for providing value added services to the Town should the need arise and
- **Financial Qualifications:** The respondent shall provide full disclosure of information regarding its financial condition. The respondent shall submit audited financial statements for the past three fiscal years. The financial statements must include income statements, balance sheets, and statements of cash flow.

5.4 Technical Approach

The following section describes the specific minimum components which should be included in the scope of work to achieve the plan purpose and the goals and objectives stated above. In

addition to the items identified below the Town is open to suggestions which the Consultant believes will be of value in producing a viable Comprehensive Plan and a modified Town Code.

1. Attendance and presentations at Planning Board meetings. These are scheduled two (2) times a month on the first and third Wednesday of the month
2. Attendance at Zoning Board of Appeals and Town Board meetings, as requested.
3. Make appropriate presentations before the Planning Board as each meeting, and the Zoning Board of Appeals, and /or Town Board upon request or as needed.
4. Review, research and make written recommendations on all site plans, special uses, subdivisions, land divisions, plats, site condominiums, re-zonings and other related matters prior to action by the Planning Board and/or Town Board.
5. Prepare documentation which includes, but is not limited to, the following:
 - a. Code conflicts from applications submitted to the Planning and other departments,
 - b. Determination of Completeness
 - c. New York State Environmental Review Quality Act (SERQA) Determinations, Findings, Public Hearing Notification
 - d. Correspondence, memoranda, and special reports; and
 - e. Resolutions
6. Review plans and accompanying documentation for compliance with the Town Planning and Zoning ordinances, State Planning, Zoning and Subdivision Laws, and SEQRA. They will also apply their knowledge of the principles of good planning practice to their assigned projects
7. Advise, assist and coordinate with the Planning Board, Zoning Board of Appeals, Town Board, Town Engineer, Attorney and/or Town officials in matters dealing with State laws or ordinances, procedures or practices relating to planning, zoning and development.
8. Prepare Town Ordinance Text Amendments as requested.
9. Be available for routine questions from the public regarding planning or procedural issues.
10. Work with the Planning Board and Town Boards on periodic reviews of the comprehensive plan update and code revisions.
11. Provide specialized planning services as requested. (i.e. Parks and Recreation, etc.)
12. Provide regular office hours in Town Hall to conduct pre-submission meetings with applicants and to coordinate directly with Town staff.
13. There are NO consultation fees reimbursed through an applicant-funded escrow account in connection with land development applications before the Planning Board (and other Boards, as applicable)

6. Review and Evaluation

Submissions received in response to the RFP will be evaluated based on the respondent's:

- Corporate capabilities and ability to perform the proposed services;
- The return of this RFP general information form and addenda, if any, signed and completed

as required.

- Expertise and past experience of the firm in providing reports on five (5) other projects of similar size and scope.
- Expertise, experience and qualifications of the firm’s proposed project personnel.
- Identification of any sub consultants assigned to this project (including all information as required for the prime consultant).
- Project approach along with any specialized experience or approach to this type work that may help differentiate the firm from the competition.
- Proposed Schedule.
- Propose total cost with a proposed budget for the work, including a detailed fee schedule for all staff assigned to this project.
- Five (5) recent references, similar to the Town of Carmel, for whom you have provided the type of services described herein. Include the date(s) services were furnished, the client name, address and the name, phone number and email address of the individual contact.
- List any potential conflicts your firm might have due to work being done for outside parties. This should include but not be limited to private developers working in the Town or other work being done by your firm with others doing business in the Town.

Each respondent’s submission will be reviewed for completeness and responsiveness to the RFP requirements. Based on its review and evaluation of the qualifications, the Town will select the most qualified respondents to interview. The solicitation will be based on the respondent’s demonstrated ability to technically and financially perform the services outlined in this document. Specifically, qualifications will be evaluated based upon the criteria presented in the subsequent paragraphs.

6.1 Evaluation Criteria

In evaluating the RFP, the Town will utilize the requirements outlined in this section to identify the respondent best qualified to perform the services.

EVALUATION CRITERIA	WEIGHT (%)
Qualifications, including expertise, past experience and services of similar size and scope.	10
Expertise and past experience of the proposed project personnel.	20
The firm's project approach and demonstrated understanding of the Town’s overall goals and objectives of the plan.	20
Any specialized experience or approach to providing the requested services including, but not limited to, demonstrated ability to work with professional staff and boards and record of past performance on similar projects/reference checks.	10
Proposed Schedule	10
Proposed Cost	30

6.2 Evaluation of Proposal

Each proposal will be reviewed against the terms of this RFP to determine if the RFP is complete and responsive and how well the respondent satisfies the evaluation criteria. The Town may reject any submittal found to be incomplete, unresponsive or not in compliance with the format requirements set forth in this RFP. A submittal may be determined to be unresponsive if any aspect is found to be unacceptable or contrary to the best interests of the Town.

The Town of Carmel regards the submission of the proposal in response to the RFP as the most important factor in the selection of a respondent to provide services for the operation, maintenance and management of the current scope of services and their capabilities to provide innovative improvements at a future date. The Town of Carmel reserves the right to reject any and all responses to the RFP and is under no obligation to award a contract.

The responsibility for the final selection rests solely with the Town of Carmel. The Town of Carmel shall not be liable to any respondent for costs associated with responding to the RFP for the respondent's participation in any oral interview, or for any costs associated with the negotiations.

7. Professional Liability Insurance

The Consultant shall, at its sole expense, acquire, continuously maintain during the period in which the Consultant is performing services, and provide the Town with acceptable proof of professional liability insurance coverage with an annual aggregate of not less than \$2,000,000 per occurrence, covering acts, errors, or omissions of a professional nature committed or alleged to be committed by the Consultant or any of its subcontractors as a part of its performance of professional engineering services. The Consultant shall agree to maintain in full force and effect during the term of the contract Workers Compensation Insurance.

In addition, the Consultant agrees to indemnify and save harmless the Town against all liabilities, claims and demands for personal injury or property damages or other expenses suffered or arising out of or caused by any negligent acts or omissions of the Consultant, its subcontractors, agents, or employees incurred in the performance of its services

8. Proposal Submission Sheet R2023-003 – Professional Planning Consulting Services

A. Amount for each year

2024 \$ _____

(Total Amount in Words)

2025 \$ _____

(Total Amount in Words)

2026 \$ _____

(Total Amount in Words)

2027 \$ _____ (SOLELY AT THE OPTION OF THE TOWN)

(Total Amount in Words)

2028 \$ _____ (SOLELY AT THE OPTION OF THE TOWN)

(Total Amount in Words)

LEGAL NOTICE
REQUEST FOR PROPOSAL

NOTICE IS HEREBY GIVEN that sealed Requests for Proposal will be received at the Office of the Town Engineer, Town of Carmel, 60 McAlpin, Mahopac, New York 10541, until 11:00 AM on **August 24, 2023** for the following:

R2023-003
TOWN OF CARMEL
PUTNAM COUNTY, NEW YORK
PROFESSIONAL PLANNING CONSULTING SERVICES

Copies of the Request for proposal may be obtained at the Office of the Town Engineer, at the above address, beginning **July 20, 2023** between the hours of 8:30 AM - 4:30 PM, Monday through Friday.

Interested firms must submit their proposals in sealed envelopes marked "Town of Carmel Professional Planning Consulting Services" to the Town Engineer, Town of Carmel, 60 McAlpin Avenue, Carmel, NY 10541. Please contact the Town Engineer at 845-628-1500 for a copy of the RFP.

The Town Board of the Town of Carmel reserves the right to reject any and all submittals of proposals and abandon the proposal or may reject all submittals and re-advertise at a future date.

Richard Franzetti, Town Engineer

AKRF, Inc.

440 Park Avenue South, 7th Floor
New York, NY 10016
Attn: Jeff Taub
[J. Taub@AKARF.com](mailto:J.Taub@AKARF.com)

Barton & Loguidice, P.C.

443 Electronics Parkway
Liverpool, NY 13088
Attn: Tim Taber
TTaber@Bartonandloguidice.com

John Behan

Behan Planning Associates
6 Lake Avenue, Suite 20D,
Saratoga Springs, NY 12866
info@behanplanning.com
JBehan@BehanPlanning.com

Roger Keating

The Chazen Companies
21 Fox Street,
Poughkeepsie, NY 12601
RKeating@Labellapc.com

Community Planning & Environmental Associates

Nan C. Stolzenburg, AICP CEP
152 Stolzenburg Road
Berne, NY 12023
Nan@planningbetterplaces.com

Benjamin H. Syden, AICP

Laberge Group
4 Computer Drive
West Albany NY 12205
BSyden@Labergegroup.com

Leonard Jackson Associates

35 Dolphin Road
East Quogue, NY 11942
Attn: Marketing

Lenjackson@MSN.com

Nelson, Pope, & Voorhis, LLC

ENVIRONMENTAL · PLANNING · CONSULTING

70 Maxess Road

Melville, NY 11747

Attn: Marketing

Ccollins@Nelsonpope.com

David Lapping

Hardesty & Hanover

555 Theodore Fremd Ave.,

Suite C-301

Rye, NY 10580

Dlapping@Hardestyhanover.com

Jan. K. Johannessen

Kellard Sessions Consulting

500 Main Street

Armonk, NY 10504

JJohannessen@Kelses.com

Patrick Cleary, AICP,PP

Cleary Consulting

Planning & Environmental Services

529 Asharoken Ave

Northport, NY 11768

Cleary@optonline.net

Notice

Basic Information

Reference Number	0000325652
Issuing Organization	Town of Carmel
Owner Organization	Town of Carmel
Solicitation Type	RFP - Request for Proposal (Formal)
Solicitation Number	RFP2023-003
Title	Professional Planning Consulting Services
Source ID	PU.AG.USA.1966.C3881751
Piggyback Solicitation	No

Details

Location	Putnam County, New York
Delivery Point	60 McAlpin Avenue Mahopac NY 10541
Description	SOLICITATION IS CLOSED [A - Previous Addendum]

Dates

Publication	07/20/2023 08:39 AM EDT
Questions are submitted online	No
Closing Date	07/20/2023 09:40 AM EDT [A - Latest Addendum]

Contact Information

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

Bid Submission Process

Bid Submission Type	Physical Bid Submission
----------------------------	-------------------------

Documents

Addendum No. 2

Document	Size	Uploaded Date	Language
No Documents			

Addendum No. 1

Document	Size	Uploaded Date	Language
No Documents			

Original Solicitation

Document	Size	Uploaded Date	Language
Legal Notice R2023-003 -Town Planner Final.pdf [pdf]	115 Kb	07/20/2023 08:38 AM EDT	English

Categories

Selected Categories

NIGP Categories (6)	
906	ARCHITECTURAL SERVICES, PROFESSIONAL
90657	Land Development and Planning - Architectural Land Development and Planning - Architectural
90666	Planning, Site (Installation and Project) Planning, Site (Installation and Project)
90664	Planning, Urban (Community, Regional, Area wide, and State) Planning, Urban (Community, Regional, Area wide, and State)
925	ENGINEERING SERVICES, PROFESSIONAL
92561	Land Development and Planning/Engineering Land Development and Planning/Engineering
926	ENVIRONMENTAL AND ECOLOGICAL SERVICES
92672	Planning and Advisory Services, Environmental Planning and Advisory Services, Environmental
918	CONSULTING SERVICES
91892	Urban Planning Consulting Urban Planning Consulting

This copy of the NIGP Code is the property of the National Institute of Governmental Purchasing, Inc. (NIGP), is displayed and used by BidNet under license from Periscope Holdings, Inc. (the authorized sub-licensor of NIGP), and is protected under the copyright laws of the United States. It may not be copied or used (in whole or part) by any party unless such party is authorized to do so under the terms of a written license agreement entered into with NIGP or its authorized sub-licensors expressly authorizing such party to use the NIGP Code. Unauthorized copying or use is prohibited. Dated: January 2016

Document Request List

Document Request List

Organization Name	Main Contact	Download Date	City	Province/State
Tighe & Bond	Jessica Frey	07/21/2023 11:39 AM EDT	Westfield	Massachusetts
VMC Group Inc	Charles Ganim	07/20/2023 05:31 PM EDT	Niagara falls	New York
Batta Environmental Associates	Gabriella Kendus	07/20/2023 05:02 PM EDT	Newark	Delaware
HVEA Engineers	Karen Anewalt	07/20/2023 02:29 PM EDT	Beacon	New York
LaBella Associates	Kris Lepel	07/20/2023 12:59 PM EDT	Rochester	New York
Colliers Engineering & Design, Inc.	Donna Kelly	07/20/2023 11:17 AM EDT	Holmdel	New Jersey
Hardesty & Hanover	David Lapping	07/20/2023 10:42 AM EDT	New York	New York
JMT of NY, Inc.	Teresa York	07/20/2023 10:20 AM EDT	Latham	New York
The LA Group Landscape Architecture and Eng., P.C.	David Miller	07/20/2023 10:19 AM EDT	Saratoga Springs	New York
KARC	Kelly Libolt	07/20/2023 10:19 AM EDT	Poughkeepsie	New York
Sterling Environmental Engineering, P.C.	Mark Millsbaugh	07/20/2023 10:01 AM EDT	Latham	New York
QPK DESIGN	Joanne Cook	07/20/2023 09:53 AM EDT	Syracuse	New York
NV5 New York - Architects Engineers Landscape Architects & Surveyors	Alicia Petrusis	07/20/2023 09:51 AM EDT	New York	New York
Creighton Manning Engineering, LLP	Shelly Johnston	07/20/2023 09:20 AM EDT	Albany	New York
D&B Engineers and Architects, D.P.C.	Robert Anderson	07/20/2023 09:14 AM EDT	Woodbury	New York
Weston & Sampson	Mary Ann Trujillo	07/20/2023 08:53 AM EDT	Reading	Massachusetts
Bar Down Studio	Dana Hochberg	07/20/2023 08:51 AM EDT	Beacon	New York
M.J. Engineering and Land Surveying, P.C.	Becky Cahill	07/20/2023 08:50 AM EDT	Clifton Park	New York
SLR Engineering, Landscape Architecture and Land Surveying, P.C.	Lauren Jones	07/20/2023 08:48 AM EDT	Cheshire	Connecticut
architecture+	Colleen Breiner	07/20/2023 08:47 AM EDT	Troy	New York
James J. Hahn Engineering, P.C.	James Hahn	07/20/2023 08:47 AM EDT	Brewster	New York
Environmental Design & Research, P.C.	Wanda Nieves Hutchins	07/20/2023 08:46 AM EDT	Syracuse	New York
LaBella Associates, DPC	Jill Sawyer	07/20/2023 08:45 AM EDT	Buffalo	New York



August 18, 2023

Mr. Richard Franzetti, P.E.
Town Engineer
Town of Carmel
60 McAlpin Avenue
Mahopac, New York 10541

Re: Professional Planning Consulting Services

Dear Mr. Franzetti,

Pursuant to RFP R2023-003, I am pleased to submit the following response to continue providing professional planning support services to the Town of Carmel.

As you know, I have provided professional planning support to the Town for approximately 23 of the past 28 years commencing in 1995. The depth and breadth of my understanding of the planning issues facing the Town is unique.

The Town is at a pivotal moment, where years of work on an updated Comprehensive Plan are about to come to fruition. Implementing the goals and policies of this new plan while simultaneously dealing with rapidly changing market and demographic conditions, infrastructural limitations and an intricate regulatory framework, will present significant challenges. In order for the Town to continue to deliver deliberate and well considered land use decisions, the Town's vision for the future must be integrated with its past historical context. My years of experience in providing professional planning services to the Town should now, more than ever, prove to be a valuable asset.

I look forward to the opportunity, and am eager to continue providing professional planning services to the Town.

Sincerely,

A handwritten signature in black ink, appearing to read "Patrick Cleary", written over a horizontal line.

Patrick Cleary, AICP, CEP, AP, LEED AP

QUALIFICATIONS:

Cleary Consulting was formed in 1990 and operates as a Sole Proprietorship consulting firm.

Cleary Consulting



Patrick Cleary, AICP, CEP, PP, LEED AP is the firm's principal, and will provide all services associated with this assignment. No junior level staff will be assigned to this assignment.

The attached statement of qualifications provides details of prior experience.

TECHNICAL APPROACH:

Cleary Consulting proposes to continue providing professional planning support services to the town as it has in the past; including the following tasks:

1. Attendance and presentations at Planning Board meetings.
2. Attendance at Zoning Board of Appeals and Town Board meetings, as requested.
3. Make appropriate presentations before the Planning Board as each meeting, and the Zoning Board of Appeals, and /or Town Board upon request or as needed.
4. Review, research and make written recommendations on all site plans, special uses, subdivisions, land divisions, plats, site condominiums, re-zonings and other related matters prior to action by the Planning Board and/or Town Board.
5. Prepare documentation which includes, but is not limited to, the following:
 - a. Code conflicts from applications submitted to the Planning and other departments,
 - b. Determination of Completeness
 - c. New York State Environmental Review Quality Act (SERQA) Determination Public Hearing Notification
 - d. Correspondence, memoranda, and special reports; and
 - e. Resolutions
6. Review plans and accompanying documentation for compliance with the Town Planning and Zoning ordinances, State Planning, Zoning and Subdivision Laws, and the SEQRA. They will also apply their knowledge of the principles of good urban planning to their assigned projects
7. Advise, assist and coordinate with the Planning Board, Zoning Board of Appeals, Town Engineer, Attorney and/or Town officials in matters dealing with State laws or ordinances, procedures or practices relating to zoning and development.
8. Prepare Ordinance Text Amendments as requested.
9. Be available for routine questions from the public regarding planning or procedural issues.
10. Work with the Planning Board and Town Boards on periodic reviews of the comprehensive plan update and code revisions.
11. Provide specialized planning services as requested. (i.e. Parks and Recreation, etc.)

12. Provide regular office hours in Town Hall to conduct pre-submission meetings with applicant and to coordinate directly with staff.

PROJECT SCHEDULE:

Cleary Consulting is prepared to commence work on this assignment immediately.

PROJECT COST/BUDGET:

The work outlines in this proposal will be accomplished for an annual fee of \$70,000. This represents a restoration of the amount of our annual fee prior to the last contract extension. This fee would remain fixed throughout the term of the contract.

REFERENCES:



CONFLICTS OF INTEREST:

Cleary Consulting has no known conflicts of interest with any parties doing business in the Town of Carmel.

PROPOSAL SUBMISSION SHEET R2020-001 – PROFESSIONAL PLANNING CONSULTING SERVICES

Amount for each year:

2024 \$70,000.00

Seventy Thousand Dollars

(Total Amount in Words)

2025 \$70,000.00

Seventy Thousand Dollars

(Total Amount in Words)

2026 \$70,000.00

Seventy Thousand Dollars

(Total Amount in Words)

2027 \$70,000.00 (SOLEY AT THE OPTION OF THE TOWN)

Seventy Thousand Dollars

(Total Amount in Words)

2028 \$70,000.00 (SOLEY AT THE OPTION OF THE TOWN)

Seventy Thousand Dollars

(Total Amount in Words)

GENERAL INFORMATION FORM

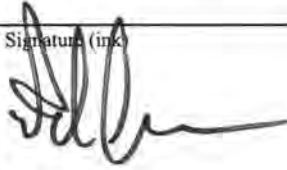
QUESTIONS: All inquiries for information regarding this solicitation should be directed to:
 Richard J. Franzetti, P. E., Town Engineer
 Phone: (845) 628-2087
 e-mail: rjf@ci.carmel.ny.us

DEADLINE FOR QUESTIONS: August 15, 2023 11:00 AM

DUE DATE: Sealed Proposal Packages will be received until **August 24, 2023 at 11:00 AM.**

ADDRESS Proposals should be mailed or hand delivered to:
Town of Carmel Town Engineer
 60 McAlpin Avenue
 Mahopac, NY 10541
RE: R2023-003
Request for Professional Planning Consulting Services

COMPANY INFORMATION/SIGNATURE:

Full Legal Name (print) Cleary Consulting		Federal Taxpayer Number (ID#) [REDACTED]	Contractor's Registration
Business Name / DBA Name / TA Name and Address Cleary Consulting		Payment Address [REDACTED]	Purchase Order Address
Contact Name/Title Patrick Cleary Firm Principal		Signature (ink) 	Date August 18, 2023
Telephone Number [REDACTED]	Fax Number [REDACTED]	Toll Free Number	E-mail Address [REDACTED]

The Firm

Cleary Consulting is a professional planning firm offering a full range of planning and environmental services for government and the private sector. Established in 1990, **Cleary Consulting** was designed and remains today, a small, intimate, personal service consulting firm. Founded by Patrick Cleary, a professional planner with over 40 years of experience in the field, the firm relies on a management philosophy which minimizes in-house staff and relies upon existing relationships with affiliated professionals to “custom fit” project personnel. In this way, Mr. Cleary is able to extensively participate in the technical elements of each project.



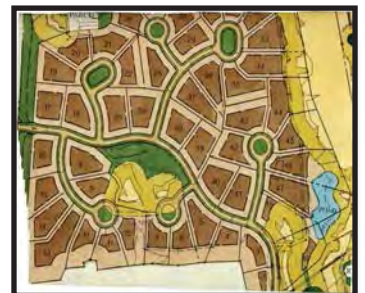
This approach assures clients personalized service, and a high degree of professional accountability, while simultaneously maintaining a full range of professional planning and work production capabilities. Our goal is to provide quality planning services in a timely and cost-effective manner.

Cleary Consulting offers a broad array of planning services ranging from site specific planning studies, zoning analysis and code development, SEQRA support and Environmental Impact Statements to area wide comprehensive plans, and complete “turnkey” Planning Board support, advisory, and implementation services.

Cleary Consulting has established a substantial track record of providing clients with creative solutions within existing time and budgetary constraints. The firm’s work is characterized by the following qualities:



- Dependable professional service
- Creativity & ingenuity
- Accountability
- Prompt and responsive work product delivery
- Cost effectiveness



Our service represents a unique and competitive alternative.

Cleary



Services



Clery Consulting offers a full range of professional planning and environmental services, including:



Board Support & Advisory Services:

- Board Support & Advisory Services
- Establishment of Planning Board Process & Procedures
- Board Training
- Technical Review of Site Plan & Subdivisions

Environmental Planning:

- Environmental Impact Statements (SEQRA & NEPA)
- Environmental Assessments
- Site Analysis
- Natural Resource Inventories
- Environmental Design
- Wetland Analysis & Mitigations Plans

Site Planning:

- Site Plan & Subdivision Design
- Site Development Feasibility Studies

Comprehensive Planning:

- Comprehensive Plans
- Land Use Plans
- Neighborhood Plans
- Urban Design
- Open Space & Recreation Plans
- Local Waterfront Revitalization Planning
- Urban Renewal Plans
- New Urbanism Planning

Public Participation:

- Community Visioning
- Consensus Building
- Meeting Facilitation



Zoning:

- Zoning Studies
- Zoning Ordinance Drafting
- Zoning Amendments
- Zoning Mapping & Amendments
- Build-Out Analyses

Economic & Community Development:

- Revitalization Plans
- Business Improvement District Plans
- Economic Analysis & Market Studies
- Demographic Analysis
- Community Development Activities

Grant Solicitation & Funding Support:

- Grant Solicitation
- CDBG Packaging
- Grant Regulatory Compliance
- Foundation/Corporate Funding for Municipal Initiatives

Transportation Planning:

- Traffic Planning & Studies
- Mobility & Circulation Studies
- Parking Analysis & Planning
- Transportation Demand Management

Green Building & Sustainable Development:

- LEED for Neighborhood Development Certifications
- Green Building Codes & Standards
- Sustainable Development Plans



Patrick Cleary, AICP, CEP, PP, LEED AP AP, CNU-A

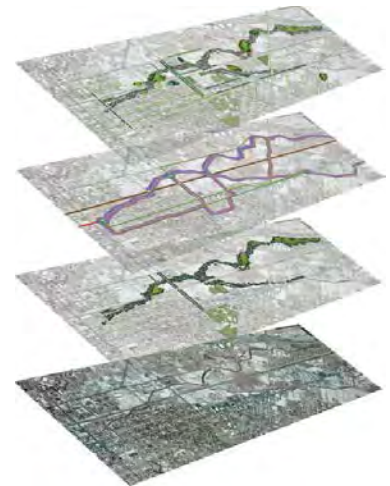
Patrick Cleary is a licensed and certified professional planner with over 40 years of experience in the field of planning. Mr. Cleary serves as the Principal of **Cleary Consulting**, and is the professional primarily responsible for the work produced by the firm.



Prior to the formation of **Cleary Consulting**, Mr. Cleary worked in both the public and private sectors; as a municipal planner as well as a planner on the staff of consulting firms. This range of experience has provided Mr. Cleary with a comprehensive understanding and a balanced approach toward the field of planning. This in-depth knowledge translates into a keen understanding of the planning process and the characteristics of the profession.

Professional Experience:

- Current:** Principal, Cleary Consulting
Northport, NY
- Previous Experience** Principal Planner, Village of Port Chester
Port Chester, NY
- Planner, Divney Consulting
White Plains, NY
- Planner, Town of Smithtown
Smithtown, NY
- Planner, McCrosky Reuter
Mineola, NY



Academic Credentials:

Master of Regional Planning Degree
University of Massachusetts, Amherst MA

Bachelor of Arts Degree - Environmental Science/Geography
State University of New York at Plattsburgh, Plattsburgh, NY

Real Estate Certificate
New York University, New York, NY

New Urbanism Certificate
University of Miami, School of Architecture

Community Leadership Alliance Program
Pace University, Elizabeth Haub School of Law, Land Use Law Center



Clients



Clery Consulting is working with, or has completed work for the following clients:

PUBLIC SECTOR CLIENTS

Westchester County

- Westchester County
- City of White Plains
- City of New Rochelle
- City of Mount Vernon
- City of Peekskill
- City of Rye
- Town of Harrison
- Town of Eastchester
- Town of Mamaroneck
- Town of New Castle
- Town of Greenburgh
- Town of Yorktown
- Town of Mount Pleasant
- Village of Port Chester
- Village of Tuckahoe
- Village of Dobbs Ferry
- Village of Larchmont
- Village of Ossining
- Village of Sleepy Hollow
- Village of Ardsley
- Village of Briarcliff Manor
- Village of Hastings-On-Hudson

Putnam County:

- Town of Carmel
- Town of Kent
- Town of Philipstown

New York City:

- Lower Manhattan Development Corp. (LMDC)
- Department of Environmental Protection

Dutchess County

- Town of Beekman
- Town of Pawling

Nassau County

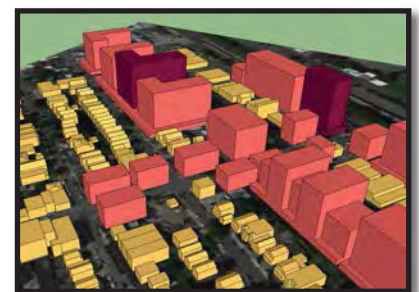
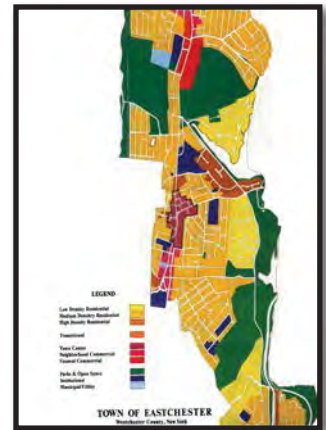
- Nassau County
- City of Glen Cove
- Village of Garden City
- Village of Thomaston
- Village of Brookville

Suffolk County:

- Suffolk County
- Town of Southold
- Town of East Hampton
- Town Southampton
- Town Shelter Island
- Town of Riverhead
- Village of Southampton
- Village of Dering Harbor
- Village of East Hampton
- Village of Greenport
- Village of North Haven
- Village of Quogue
- Village of Sag Harbor
- Village of Westhampton Beach
- Village of Westhampton Dunes
- Village of Northport
- Village of Head-of-the-Harbor

Regional Agencies:

- New York Metropolitan Transportation Council (NYMTC)
- East End Transportation Council (EETC)
- New York State Department of Transportation
- Metropolitan Transportation Authority (MTA)



PRIVATE SECTOR CLIENTS

- Ginsburg Development
- Liberty Associates
- Verizon Wireless
- Big V Supermarkets (Shop Rite)
- Toll Brothers
- Lowerre Partnership
- AT&T
- Starbucks
- Evergreen Homes
- Walgreens
- The Mear Group
- LCB Senior Living
- Alpine Residential

- Cardinal McClosky Community Services
- Trammel Crow Residential
- G&S Investors
- Target
- Fairchild Properties (Hilton Hotels)
- NEXTEL
- Best Buy
- Kmart
- H.O. Penn Machinery Company
- Boniello Land & Realty
- Elk Homes
- The Renatus Group
- Momentum Realty
- Hudson Valley iCampus

- The Read Property Group
- New York School for the Deaf
- Bedford Community Church
- Westchester Hills Golf Club
- National Realty & Development
- Sierra Club
- Scenic Beacon Developments
- Storage Deluxe
- Halpern Real Estate Ventures
- MADD Madonna, LLC
- Ward Capital Management
- Rosewalk Properties
- Adira at Riverside
- One Key



Professional Affiliations

Mr. Cleary is an accredited member of the American Institute of Certified Planners, and is a licensed Professional Planner in the state of New Jersey. Mr. Cleary is a member of the American Planning Association, Urban Land Institute, New York Planning Federation, Westchester Municipal Planning Federation, and National Charrette Institute



Mr. Cleary is a member of the US Green Building Council, is an accredited member of the Congress for New Urbanism and was one of the first in the nation to obtain LEED AP certification in the specialty of Neighborhood Development (first offered in 2010).



In 2011, Mr. Cleary was a member of the first class of approximately 30 professionals nation-wide to obtain the Certified Environmental Planner (CEP) credential offered by the American Institute of Certified Planners.

Mr. Cleary is on the Board of Directors of the Westchester Municipal Planning Federation, the Westchester County Association Real Estate Committee, formally served on the national Board of Directors of the American Society of Consulting Planners, and is the Chairman of the Village of Asharoken Planning Board.

Mr. Cleary is a frequent lecturer at professional organizations and conferences, at the Elizabeth Haub School of Law at Pace University, Manhattanville College and has served as a studio advisor at the Graduate Urban Policy and Planning Program at Hunter College.



References

Available Upon Request

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: September 5, 2023

Re: AAA Dumpster Refuse Collection

As the Board is aware, the Town recently entered into an agreement with AAA carting to collect dumpster refuse from the following locations Town Hall: CSD 2 (2 locations) CSD 4, CWD 2, Sycamore Park (May-Sept/Oct-Apr), Lake Casse Park, and the Highway Garage.

The Engineering Department contacted AAA carting to confirm that the collection rates to be included in the 2024 budget. Per the attached emails AAA carting agrees to maintain the following pricing for 2024:

Site	\$/month
Town Hall	323.45
Sewer District #2	283.62
Sewer District #2	93.53
sewer District #4	93.53
Water district #2	110.67
Sycamore Park (may-sept)	472.84
Lake Casse Park	179.26

The only proposed changes are as follow:

- Include dumpster collection from the Lake Secor Park District in the amount \$93.53. Note that this cost was not included in the prior resolution.
- Increase the Highway collection from \$280.56 to \$292.50

AAA carting has adequately provided this service for the Town since 2013. Based upon the above, we recommend that the contract be renewed, with AAA carting to include the update pricing.

Note that these costs have been included in the preliminary 2024 budget I request that this matter be placed on an upcoming work session for discussion.

From: pat_aaacarting.com
To: Esteves,Donna
Cc: Franzetti,Richard
Subject: Re: 2024 Budget
Date: Tuesday, August 29, 2023 10:15:37 AM

Can we get Highway up to where it was at \$292.50 for 2024

Pat Cartalemi

AAA Carting

914-739-9527 - Office

914-602-8761 - Cell



From: Esteves,Donna <de@ci.carmel.ny.us>
Sent: Tuesday, August 29, 2023 10:08 AM
To: pat_aaacarting.com <pat@aaacarting.com>
Cc: Franzetti,Richard <rjf@ci.carmel.ny.us>
Subject: RE: 2024 Budget

Ok, so just to confirm.... The 2024 rates will be as follows:

Site	S/B
Town Hall	323.45
Sewer District #2	283.62
Sewer District #2	93.53
sewer District #4	93.53
Water district #2	110.67
Sycamore Park (may-sept)	472.84
Lake Casse Park	179.26
Highway Garage	280.56
Lake Secor	93.53

Donna Esteves

Town of Carmel ~ Engineering Department
60 Mc Alpin Ave

Mahopac, NY 10541
845-628-1500 ext. 184

From: pat aacarting.com <pat@aacarting.com>
Sent: Tuesday, August 29, 2023 10:02 AM
To: Esteves, Donna <de@ci.carmel.ny.us>
Cc: Franzetti, Richard <rjf@ci.carmel.ny.us>
Subject: Re: 2024 Budget

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Yes, that is correct.

Pat Cartalemi
AAA Carting
914-739-9527 - Office
914-602-8761 - Cell



From: Esteves, Donna <de@ci.carmel.ny.us>
Sent: Tuesday, August 29, 2023 10:01 AM
To: pat aacarting.com <pat@aacarting.com>
Cc: Franzetti, Richard <rjf@ci.carmel.ny.us>
Subject: 2024 Budget

Hi Pat,

As follow up to our conversation this morning, I just want to confirm that the TOC container collection rates will be valid through the end of next year, as I need to include the costs in the 2024 budget. Once you confirm through this email, the Engineering Department will request to Board to extend the contract through December 31, 2024. As discussed, the request to extend the contract will include the rate adjustment for Lake Secor Park District which was missed in the last request/resolution.

Thanks,



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 MICHAEL CAZZARI
TOWN BOARD

DATE: AUGUST 29, 2023

RE: REQUEST TO DISPOSE OF EQUIPMENT

I am requesting the authorization to dispose of the following equipment:

- Truck #39 – 2006 Int'l 4900 4X2 Dump, VIN 1HTWDAZR16J214569
- Old Mower Heads
- Old Plow Blades
- Old Dump Body Head Boards

Truck #39 has outlived its useful life, as well as the other items that have accumulated in the yard.

cc Comptroller's Office
Supervisor's Office – Joanna



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 MICHAEL CAZZARI
TOWN BOARD

DATE: AUGUST 23, 2023

RE: REQUEST TO ATTEND 2023 NYSAOTSOH ANNUAL CONFERENCE

I am requesting the authorization to attend NYS Association of Town Superintendents of Highways Annual Conference September 26th through the 29th, 2023.

The estimated cost:

- \$537 3-night stay (\$179/3-nights)
- \$700 Food Package/Registration fee
- \$150 estimated gas/expenses

These costs are included in my 2023 Budget.



2023 NYSATS Annual Conference Registration Form

Turning Stone Resort & Casino -5218 Patrick Road, Verona, NY 13478 - 1-800-771-7711

ALL REGISTRATION FEES AND MEALS TO BE PAID DIRECTLY TO NYSATS

111 Washington Ave., Suite 600, Albany, NY 12210 or online at www.nystownhwys.org.

Name (as you would like it to appear on your badge) _____ Michael Simone _____
Superintendent of Highways

Guest/Spouse Name (if attending) _____ Town of Carmel Highway Dept. _____
55 McAlpin Ave.

Job Title _____ Mahopac, NY 10541

Town/Organization _____

Address _____

City _____ State _____ Zip _____

Phone 845-628-7474

Email msimone@Bestweb.net

Registration Options:

Highway Superintendents and Vendor Package Options:

- Early Bird Registration (by 9/8/23) **\$700** - 3 Night Option (Full Conference, Tuesday – Friday) *\$800 after 9/8/2023* Registration includes registration fee, 3 breakfasts, 2 lunches, 3 receptions/dinners, education sessions, annual meeting of the members, entertainment, optional activities, and refreshment breaks.
- Early Bird Registration (by 9/8/23) **\$600** – 2 Night Option (Wednesday Afternoon – Friday) *\$700 after 9/8/2023* Registration includes registration fee, 2 breakfasts, 2 lunches, 2 receptions/dinners, education sessions, annual meeting of the members, entertainment, optional activities, and refreshment breaks

Guests/Spouse Package Options:

- Early Bird Registration (by 9/8/23) **\$600** - 3 Night Option (full Conference, Tuesday – Friday) *\$700 after 9/8/2023* Registration includes registration fee, 3 breakfasts, 2 lunches, 3 receptions/dinners, entertainment, optional activities, and refreshment breaks.
- Early Bird Registration (by 9/8/23) **\$500** – 2 Night Option (Wednesday – Friday) *\$600 after 9/8/2023* Registration includes registration fee, 2 breakfasts, 2 lunches, 2 receptions/dinners, entertainment, optional activities, and refreshment breaks

Hotel room rates are NOT included in registration package price

If you are choosing to not utilize the package options there is a registration fee required for all highway superintendent and vendor attendees:

- Early Bird Registration (by 9/8/23) **\$150**
- Registration Fee (after 9/8/23) **\$250**
- Registration Fee (retiree) **\$ 50**

Commuter Meals (Inclusive of tax and gratuity):

- | | | | | | |
|--|-------|---|--------|---|--------|
| <input type="checkbox"/> Tuesday Reception | \$ 50 | <input type="checkbox"/> Wednesday Vendor Night | \$ 155 | <input type="checkbox"/> Thursday Banquet Night | \$ 155 |
| <input type="checkbox"/> Wednesday Breakfast | \$ 45 | <input type="checkbox"/> Thursday Breakfast | \$ 45 | <input type="checkbox"/> Friday Breakfast | \$ 45 |
| <input type="checkbox"/> Wednesday Lunch | \$ 55 | <input type="checkbox"/> Thursday Lunch | \$ 55 | Total \$ _____ | |

Payment Options:

Via website: www.nystownhwys.org Via fax: 518-426-3838
Via mail: NYSATS, 111 Washington Ave., Suite 600
Albany, NY 12210

Check Credit Card Amount: \$ _____

Name (as it appears on the card) _____

Card No: _____ Exp: _____

Security Code: _____ Telephone No. _____

Billing Address: Town of Carmel Highway _____
55 McAlpin Avenue _____
Mahopac, NY 10541 _____

Email for Receipt: Highway@ci.carmel.ny.us _____
845.628.7474 _____

Exhibit Booth Registration

\$500 Exhibit Booth (Includes one \$150) Conference registration. Meal packages are **NOT** included and must be purchased separately. (3-day \$700 before 9/8/2023, 2-day \$600 before 9/8/2023 or by commuter meal pricing). A *floor plan of the exhibit space will be available in August.*

Questions or special needs or dietary restrictions? Contact Beth Gould at (518) 426-1023 or info@nystownhwys.com

Emergency Contact Information:

Emergency Contact Name: _____

Emergency Contact Phone: _____

ROOM RATES

- Hotel & Tower Rooms: \$179.00
- Tower Junior Suites: \$259.00
- Lodge Suites with Balcony: \$269.00

Check-In time 3:00 PM

Please call the Turning Stone Resort & Casino at 1-800-771-7711 to reserve your room, please let them know you are with the NYS Town Superintendents of Highways room block. (Turning Stone Resort & Casino will only reserve your reservation by phone.)

If you have special needs or dietary restrictions, please contact Beth Gould at (518) 426-1023 or info@nystownhwys.org.



Thank You to our 2022 Conference Exhibitors

ADMAR Construction Equipment & Supplies
Alta Construction Equipment
Auctions International
Bosch Rexroth
CAHill Tech
Certified Power
Chemung Supply Corporation
Collier's Engineering
ConwayBeam
Cornell Local Roads Program
DEL Hydraulics, Inc.
DLVEWS, Inc
Eagle Associates
EJ
Everest Equipment Co.
Five Star Equipment
GeoStabilization International
Gernatt Asphalt Products, Inc.
GovDeals
Gradall
Henderson Products
Hybrid Building Solutions
Innovative Surface Solutions
International Trucks

J & J Equipment
Kleis Equipment, LLC
Krown Rust Control
Liquid Asphalt Distributors Association
Northeast Sweepers & Rentals, Inc.
Northern Supply
PMC/Castner
Reed Systems
Roy Teitsworth INC
SealMaster of WNY
SnoDepot
Sourcewell
Stephenson Equipment Inc.
Suit-Kote Corp.
Tenco Industries
The Gorman Group
Tracey Road Equipment
Trius Inc.
UNIQUE Paving Materials Corp.
Valley Fab & Equipment
Van Bortel
Viking Cives USA
Winter Equipment Company

Exhibit Booth Space Deadline: Friday, August 25, 2023



SCHEDULE OF EVENTS

September 26-29, 2023

Tuesday, September 26

2:00 PM – 4:00 PM

Registration

3:00 PM – 5:00 PM

President's Reception with Exhibitors

Sponsored by Chemung Supply Corporation



5:00 PM

Dinner on Your Own

7:30 PM

Corn Hole Tournament and Karaoke

Sponsored by Viking Cives



Wednesday, September 27

6:00 AM – 7:00 AM

Early Morning Coffee

7:00 AM

Breakfast

8:00 AM – 8:45 AM

Keynote Address

William Van Slyke, Van Slyke Consulting

9:00 AM – 10:00 AM

Legislative & Advocacy Roundtable

Fred Hiffa and Megan Osika, Park Strategies

Association lobbyists will provide an overview of the 2023-24 Budget and Legislative Session.

10:00 AM – 10:30 AM

Break with Exhibitors

Sponsored by Five Star



10:30 AM – 11:30 AM

Best Practices for Salt Reduction

Tim Fiallo, Town of Hague, Warren Co.

Rob Vopleus, Town of Lake George, Warren Co.

Moderator: Phil Sexton, WIT Advisers

Winter Management Specialists, Tim Fiallo and Rob Vopleus will speak with pride and passion about the town of Hague and the town of Lake George's salt reduction efforts. Hear firsthand on how these Highway Departments successfully reduced their road salt by more than 50%.

12:00 PM – 1:00 PM

Lunch

1:00 PM – 5:00 PM

Golf and Afternoon Events

Golf Sponsored by Navistar, Inc. / International Trucks



7:00 PM – 10:00 PM

Vendor Night, Reception and Dinner

NYSAOTSOH Conference, Edu

Thursday, September 28

6:00 AM – 7:00 AM

Early Morning Coffee

7:00 AM – 8:15 AM

Breakfast

8:30 AM – 9:30 AM

Superintendents Roundtable

Join fellow Highway Superintendents for a round table discussion on the ins and outs of the position and associated responsibilities.

9:45 AM – 10:45 AM

Navigating a First Amendment Audit

Michael Kenneally, Executive Director, New York State Municipal Workers' Compensation Alliance

Lori Mithen-DeMasi, General Counsel, Association of Towns of the State of New York

First Amendment audits are happening across New York State. First Amendment auditors seek to record town facilities, operations and interactions with town officers and employees and often post them on social media platforms. This session will review basic First Amendment principles and the use of recording equipment on town property. We'll also discuss employee safety and best practices for interacting with individuals who are conducting First Amendment audits.

10:45 AM – 11:15 AM

Break with Exhibitors

11:15 AM – 12:00 PM

Annual Meeting of the Members

12:15 PM – 1:00 PM

Lunch/Vendor Lunch

1:10 PM – 2:00 PM

DOT/CHIPS Update

NYSDOT Administered Aid to Local Agencies – NYSDOT representatives will provide an overview of funding programs available to municipalities to construct transportation projects and program requirements.

2:05 PM – 3:05 PM

Managing your Highway Budget

Dan Acquilano, Manager, Local Official Training Unit Division of Local Government & School Accountability

The Town Board is charged with the fiscal oversight of all Town functions, including adopting and monitoring the annual budget. The Town Highway Superintendent plays a critical role in assisting the Town Board in their oversight responsibilities by providing clear and carefully planned budget information that protects the taxpayers' interests by including only those expenditures that are necessary for operations, and planned revenues that are realistic. This session will walk through how the Highway Superintendent can provide more accurate budget estimates, to provide the Board meaningful information that they can use to make decisions during the budget process, development of the required Highway 284 agreement, and ensuring highway spending remains in line with the adopted and amended budget.

Education Symposium & EXPO

3:05 PM – 3:15 PM

Break

3:15 PM – 4:30 PM

Legal and Regulatory Panel

Timothy A. Frateschi, Esq., Baldwin, Sutphen & Frateschi, PLLC
Lori Mithen-DeMasi, General Counsel, Association of Towns of the State of New York
Moderator: David P. Orr, PE, Director, NYS LTAP Center, Cornell Local Roads Program

Industry and legal experts will be available for a question-and-answer session.

Friday, September 29

6:00 AM – 7:00 AM

Early Morning Coffee

7:00 AM – 8:30 AM

Breakfast

8:45 AM – 10:00 AM

Retirement Informational Session

A representative from the New York State and Local Retirement System will give a short presentation and answer any questions.

6:30 PM – 7:30 PM

Reception

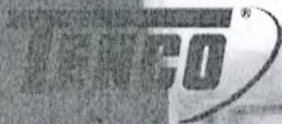
Sponsored by Alta Equipment Company



7:30 PM – 10:00 PM

Annual Banquet & Entertainment

Sponsored by Tenco and Conway Beam



Education Sessions Sponsored by:

Peckham Industries, Inc.



9/13/2023 Work Session Agenda Item #8

*Michael G. Carnazza
Director of Code Enforcement*

*(845)628-1500
Ext. 170*



*60 McAlpin Avenue
Mahopac, New York 10541*

To: Supervisor Michael Cazzari
Town Board

From: Michael Carnazza, Building Inspector

Date: September 8, 2023

Re: Training for 2023

Please be advised, Joe Wilichoski would like to take 18 of the 24 hours of required training from October 22-24, 2022 on Latham, N.Y.

The cost of the classes is \$395.00 (Invoice attached). In addition, there will be two nights stay at the hotel @ \$114.00/night.

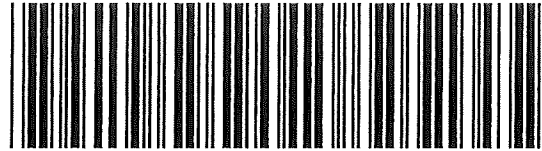
Can this be placed on the next work session to discuss.

Thank you,

**WILICHOSKI III , JOSEPH
REGISTRATION CONFIRMATION**

PLEASE PRINT ALL PAGES OF

**THIS DOCUMENT IMMEDIATELY
PRINT BEFORE CLICKING PAYMENT**



NY0023771

CREDIT CARD PAYMENT CLICK HERE

JOSEPH

**Congratulations. You have been confirmed for Attendance at
The CAPITAL DISTRICT CONFERENCE
YOU ARE REGISTERED FOR ALL 3 DAYS**

**The Conference will be held at:
The Marriott Albany
189 Wolf Road
Albany NY 12205**

**Registration: 6:00-8:00pm October 22, 2023 - 7:30am Each Morning
Class: Starts promptly 9:am Monday. 8:00am Tuesday and Wednesday
Please carefully review all information below for accuracy.**

email any corrections to register@codesclass.com

**Last Name: WILICHOSKI III
First Name: JOSEPH
Middle Initial: J
Job Title: FIRE INSPECTOR
Address Line 1:
Address Line 2:
City:
State: NY
Zip:
email: jarheadf4i@gmail.com
Municipality or firm: TOWN OF CARMEL
NY Training Id Num: i
FDID Num: 40007
Phone Number: 845--**

CAPITAL DISTRICT CONFERENCE

INVOICE

August 23, 2023

INVOICE No: NY0023771 - 2023

Payable To:
CAPITAL DISTRICT NYSBOC
11 Herbet Drive
Latham NY 12110
afuller@cdnysboc.com

Attendee:
JOSEPH WILICHOSKI III

ATTENDANCE AT THE CAPITAL DISTRICT CONFERENCE

\$395.00

YOU ARE REGISTERED FOR ALL 3 DAYS

PLEASE MAKE CHECKS PAYABLE TO: CAPITAL DISTRICT NYSBOC
TAX ID: 43-1957256
NYS Vendor ID # 1100003647



Marriott Albany

189 Wolf Road, Albany, New York USA, 12205

Confirmation #72880113

Your reservation is guaranteed to your Visa card.

Stay Details

Stay Dates	Total for Stay	
Sun, Oct 22, 2023 - Wed, Oct 25, 2023	389.88 USD	
Room Type	Rooms	Adults
Guest room, 1 King, Sofa bed	1	1
Room Preferences	Rate	
No room preferences were selected.	NYS BUILDING OFFICIA	

Summary of Charges

1 room for 3 night(s)

Sunday, October 22, 2023	114.00 USD
Monday, October 23, 2023	114.00 USD
Tuesday, October 24, 2023	114.00 USD
Total Cash Rate	342.00 USD
Estimated government taxes and fees	47.88 USD

Total for Stay	389.88 USD
-----------------------	-------------------

Cancellation Policy