Finance & Administration Committee

Committee Meeting

~ Minutes ~

60 Central Ave
Cortland, NY 13045
http://www.cortland-co.org

Thursday, February 16, 2023 **10:00 AM** **Room 302**

CALL TO ORDER

The meeting was called to order at 10:00 AM by Committee Chair George Wagner

Attendee Name	Organization	Title	Status	Arrived
Sandra Price	Cortland County, NY	Committee Member	Excused	
George Wagner	Cortland County, NY	Committee Chair	Present	
Linda Jones	Cortland County, NY	Committee Member	Excused	
Christopher Newell	Cortland County, NY	Committee Vice Chair	Present	
Beau Harbin	Cortland County, NY	Committee Member	Present	
Richard Stock	Cortland County, NY	Committee Member	Excused	
Mitchel Eccleston	Cortland County, NY	Committee Member	Present	
Kevin Fitch	Cortland County, NY	Chair of the Legislature	Present	
Rob Corpora	Cortland County, NY	County Administrator	Present	
Savannah Hempstead	Cortland County, NY	Clerk of the Legislature	Present	
Victoria J. Monty	Cortland County, NY	County Attorney	Present	
Stephen Trobert	Cortland County, NY	Manager of Audit & Financial Projects	Present	
John Banewicz	Cortland County, NY	County Treasurer	Present	
Laurie Leonard	Cortland County, NY	Personnel Officer	Present	
Melanie Vilardi	Cortland County, NY	Deputy County Administrator	Present	
Ronald J. Van Dee	Cortland County, NY	Board Member	Present	
Andrea Herzog	Cortland County, NY	Director of Finance	Present	
Cathy Bischoff	Cortland County, NY	Board Member	Remote	
Amy Buggs	Cortland County, NY	Grants Administrator	Remote	
C. Withers			Remote	
Patricia Dawson	Cortland County, NY	Deputy Clerk of the Legislature	Remote	

WS			Remote	
Eddie Velazquez	Cortland Voice	Reporter	Remote	

MINUTES

1. Finance & Administration Committee - Committee Meeting - Jan 17, 2023 10:00 AM

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Christopher Newell, Committee Vice Chair
SECONDER:	Mitchel Eccleston, Committee Member
AYES:	George Wagner, Christopher Newell, Beau Harbin, Mitchel Eccleston
EXCUSED:	Sandra Price, Linda Jones, Richard Stock

RESOLUTIONS

AGENDA ITEM NO. 1 – Distribution of Fourth Quarter 2022 Sales Tax

RESULT:	**APPROVED [UNANIMOUS]** **Next: 2/23/2023 6:00 PM**
MOVER:	Christopher Newell, Committee Vice Chair
SECONDER:	Mitchel Eccleston, Committee Member
AYES:	George Wagner, Christopher Newell, Beau Harbin, Mitchel Eccleston
EXCUSED:	Sandra Price, Linda Jones, Richard Stock

ON MOTION OF WAGNER **RESOLUTION NO.**

Distribution of Fourth Quarter 2022 Sales Tax

WHEREAS, the Cortland County Legislature adopted Resolution No. 221-18, which provides for the distribution of sales tax from the County to local municipalities, AND

WHEREAS, the sales tax sharing agreement provides for the deduction directly from the gross sales tax distribution received from the State of New York a fixed sum of $1,500,000 for County purposes, with the remaining balance of the revenues to be distributed for use by the County, City of Cortland, and the various municipalities within Cortland County, AND

WHEREAS, the gross deduction for County purposes will be provided for quarterly, AND

WHEREAS, the 2022 fourth quarter sales tax information has been provided by the New York State Comptroller's Office showing a total collection for fourth quarter 2022 to be $10,079,239.67, AND

WHEREAS, the total amount available for distribution is $9,704,239.67, after the direct deduction for County purposes, AND

WHEREAS, individual municipalities by resolution have opted to apply a portion of their sales tax dollars to off-set the property tax levy and that amount ($670,000.00) is to be withheld from the quarterly distribution, AND

WHEREAS, Cortland County receives (54%), or $5,240,289.42 of the total net quarterly distribution, AND

WHEREAS, respective payments are now ready for disbursement, NOW THEREFORE BE IT

RESOLVED, that the Cortland County Legislature authorizes the County Treasurer or designee to release sales tax payments for the fourth quarter of 2022 as so stated below from Account No.

A19855.54101 in either the form of a county check or by direct bank transfer as per the request of the receiving municipality:

Municipality	Distribution Amount Pre-Tax Credit	Applied Tax Credits	Net Distribution After Tax Credit	Balance Owed Against Tax Credits
Cortland, City of	$1,722,502.54	$-0-	$1,722,502.54	$-0-
Cincinnatus, Town of	$80,466.11	$-0-	$80,466.11	$-0-
Cortlandville, Town of	$860,660.05	$-0-	$860,660.05	$-0-
Cuyler, Town of	$73,307.00	$(28,750.00)	$44,557.00	$-0-
Freetown, Town of	$55,114.30	$-0-	$55,114.30	$-0-
Harford, Town of	$87,148.16	$-0-	$87,148.16	$-0-
Homer, Town of	$293,514.50	$-0-	$293,514.50	$-0-
Homer, Village of	$208,763.50	$-0-	$208,763.50	$-0-
Lapeer, Town of	$113,625.91	$(77,500.00)	$36,125.91	$-0-
Marathon, Town of	$87,102.12	$-0-	$87,102.12	$-0-
Marathon, Village of	$44,020.70	$-0-	$44,020.70	$-0-
McGraw, Village of	$38,233.74	$-0-	$38,233.74	$-0-
Preble, Town of	$149,547.68	$-0-	$149,547.68	$-0-
Scott, Town of	$88,714.66	$-0-	$88,714.66	$-0-
Solon, Town of	$81,986.35	$-0-	$81,986.35	$-0-
Taylor, Town of	$48,103.34	$-0-	$48,103.34	$-0-
Truxton, Town of	$105,878.91	$-0-	$105,878.91	$-0-
Virgil, Town of	$253,961.15	$(16,250.00)	$237,711.15	$-0-
Willet, Town of	$71,299.53	$-0-	$71,299.53	$-0-
Total	$4,463,950.25	$(122,500.00)	$4,341,450.25	$-0-

, AND BE IT FURTHER

RESOLVED, that the Cortland County Treasurer or designee is hereby directed to deposit the County's "off the top" sum of $375,000 in the appropriate reserves and accounts as designated in Resolution No. 294-20.

CONSENT AGENDA - Items on the Consent Agenda have been endorsed by the various standing committees. Finance & Administration Committee Members may request any item be pulled from the consent agenda for further discussion and separate vote.

Referred from Building & Grounds Committee

AGENDA ITEM NO. 1 – Authorize Agreement with Bell & Spina Architects for Cortland County Courthouse Renovations for City Court Move - Buildings & Grounds Department

RESULT:	**APPROVED [UNANIMOUS]**
	Next: 2/23/2023 6:00 PM
MOVER:	Christopher Newell, Committee Vice Chair
SECONDER:	Mitchel Eccleston, Committee Member
AYES:	George Wagner, Christopher Newell, Beau Harbin, Mitchel Eccleston
EXCUSED:	Sandra Price, Linda Jones, Richard Stock

ON MOTION OF HEIDER **RESOLUTION NO.**

Authorize Agreement with Bell & Spina Architects for Cortland County Courthouse Renovations for City Court Move - Buildings & Grounds Department

WHEREAS, Cortland County requested proposals for Architectural services to accommodate City Court renovations at the Cortland County Court House, AND

WHEREAS, Cortland County received 3 proposals from Architectural firms, AND

WHEREAS, the proposal submitted by Bell and Spina Architects of 215 Wyoming Street, Syracuse, NY 13204 was the only proposal to include a total cost on services identified, AND

WHEREAS, the Cortland County Legislature's Buildings and Grounds Committee has reviewed the proposal and has recommended moving forward with this proposal, NOW THEREFORE BE IT

RESOLVED, that the Cortland Legislature hereby authorizes the County Administrator, upon review and approval of the County Attorney or designee, to enter into an agreement with Bell and Spina Architects of 215 Wyoming Street, Syracuse, NY 13204 for a cost not to exceed $109,150.00, AND BE IT FURTHER

RESOLVED, the 2023 budget be amended as follows:

INCREASE:

A162043.43021	COURT FACILITIES INCENTIVE	$109,150.00
A16205.52320	BUILDING IMPROVEMENTS	$109,150.00

AGENDA ITEM NO. 2 – Amend Resolution No. 196-22 Authorizing Agreement with KONE, Inc. for Courthouse Elevator Replacement - Buildings and Grounds Department

RESULT:	**APPROVED [UNANIMOUS]**
	Next: 2/23/2023 6:00 PM
MOVER:	Christopher Newell, Committee Vice Chair
SECONDER:	Mitchel Eccleston, Committee Member
AYES:	George Wagner, Christopher Newell, Beau Harbin, Mitchel Eccleston
EXCUSED:	Sandra Price, Linda Jones, Richard Stock

ON MOTION OF HEIDER **RESOLUTION NO.**

Amend Resolution No. 196-22 Authorizing Agreement with KONE, Inc. for Courthouse Elevator Replacement - Buildings and Grounds Department

WHEREAS, Resolution No. 196-22 authorized the County Administrator to execute a contract, for an amount not to exceed $250,000, with KONE, Inc. of 836 North State Street, Syracuse, New York

13208 for the replacement of the elevator at the Cortland County Courthouse, AND

WHEREAS, the cost of the elevator replacement came in at a cost of $265,000, NOW THEREFORE BE IT

RESOLVED, that Resolution No. 196-22 be and hereby is amended to authorize the County Administrator, upon approval of the County Attorney, or their designee, to execute a contract for an amount not to exceed $265,000, with KONE, Inc. of 836 North State Street, Syracuse, New York 13208 for the replacement of the elevator at the Cortland County Courthouse, AND BE IT FURTHER

RESOLVED, the 2023 budget be amended as follows:

INCREASE:

A16205.52320	BUILDING IMPROVEMENTS	$15,000
A359900	APPROPRIATED FUND BALANCE	$15,000

Referred from Health & Human Services

AGENDA ITEM NO. 3 – Authorize Agreement Code Blue Behavioral Health and Security Services - Department of Social Services

RESULT:	**APPROVED [UNANIMOUS]** **Next: 2/23/2023 6:00 PM**
MOVER:	Christopher Newell, Committee Vice Chair
SECONDER:	Mitchel Eccleston, Committee Member
AYES:	George Wagner, Christopher Newell, Beau Harbin, Mitchel Eccleston
EXCUSED:	Sandra Price, Linda Jones, Richard Stock

ON MOTION OF PRICE **RESOLUTION NO.**

Authorize Agreement Code Blue Behavioral Health and Security Services - Department of Social Services

WHEREAS, the Cortland County Department of Social Services desires to purchase on-site behavioral health services to promote the safety and well-being of individuals placed in emergency shelter settings including motels and warming centers, AND

WHEREAS, Family Counseling Services and Liberty Resources are authorized providers of behavioral health counseling services, AND

WHEREAS, circumstances involving guests placed under New York State Code Blue regulations have resulted in the need for on-site behavioral health services, AND

WHEREAS, the $12,000 needed for these agreements from February 24, 2023 - April 30, 2023 has been approved to be reimbursed as New York State Code Blue funding, AND

WHEREAS, the Cortland County Department of Social Services desires to purchase security services to monitor and promote the safety of individuals placed in emergency shelter settings including motels and warming centers, AND

WHEREAS, the services of a professional security company are being sought, AND

WHEREAS, circumstances involving guests placed under New York State Code Blue regulations have resulted in the need for on-site security, AND

WHEREAS, the $38,000 needed for this Agreement from February 24, 2023 - April 30, 2023 has been approved to be reimbursed as New York State Code Blue funding, NOW THEREFORE BE IT

RESOLVED, that the County Administrator, upon review and approval of the County Attorney or designee, be and hereby is authorized to enter into an agreement for the time period February 24, 2023 - April 30, 2023 with Family Counseling Services and/or Liberty Resources for a combined amount not to exceed $12,000, AND BE IT FURTHER

RESOLVED, that the County Administrator, upon review and approval of the County Attorney or designee, be and hereby is authorized to enter into an agreement for the time period February 24, 2023 - April 30, 2023 with a security company approved by the County Administrator and Commissioner of Social Services in an amount not to exceed $38,000, AND BE IT FURTHER

RESOLVED, that the 2023 County Budget be amended as follows:

Increase:

Expense:		
A60105.54800.4696	Code Blue	$50,000.00
Revenue:		
A601043.43689.4696	Code Blue	$50,000.00

AGENDA ITEM NO. 4 – Calling on the State of New York to Continue to Pass-Thru Federal Affordable Care Act Enhanced Federal Medicaid Assistance Percentage Funds

RESULT:	**APPROVED [UNANIMOUS]**
	Next: 2/23/2023 6:00 PM
MOVER:	Beau Harbin, Committee Member
SECONDER:	Christopher Newell, Committee Vice Chair
AYES:	George Wagner, Christopher Newell, Beau Harbin, Mitchel Eccleston
EXCUSED:	Sandra Price, Linda Jones, Richard Stock

ON MOTION OF PRICE **RESOLUTION NO.**

Calling on the State of New York to Continue to Pass-Thru Federal Affordable Care Act Enhanced Federal Medicaid Assistance Percentage Funds

WHEREAS, the State Fiscal Year (SFY) 2024 State Budget proposal would end the Affordable Care Act (ACA) enhanced Federal Medical Assistance Percentage (eFMAP) federal pass-thru to counties and New York City, AND

WHEREAS, the State is proposing to keep all of these federal savings going forward and use them to cover further expansions of Medicaid eligibility and benefits and to increase payments to health care providers, AND

WHEREAS, the elimination of this ACA eFMAP federal pass-thru will require the 57 counties to spend at least $280 million more in SFY 2024, and approximately $1 billion when New York City is included, AND

WHEREAS, the SFY 2024 costs to counties and New York City are scheduled to grow by 30 percent by SFY 2027, AND

WHEREAS, it is the strong view of Cortland County that congress intended these federal savings to be shared with counties proportional to the amount they contributed toward the nonfederal Medicaid match, AND

WHEREAS, since 2003, the state has shared the funds proportionally based on our analysis of savings we have received during periods when an enhanced federal Medicaid match was enacted by Congress, AND

WHEREAS, enacted in 2011, the Medicaid statutory cap for all 62 counties is $7.6 billion. The Medicaid statutory cap for the 57 counties outside of New York City is $2.25 billion, AND

WHEREAS, the additional unbudgeted cost to Cortland County for the remainder of 2023 would amount to over $700,000, AND

WHEREAS, starting in SFY 2014, New York began sharing these federal ACA savings directly with counties. The savings for a year were provided by lowering the weekly payments each county and NYC make to the state to support the State's Medicaid program. Through February 1, 2023, the state continues to share the federal savings from the ACA eFMAP with the 57 counties and NYC, AND

WHEREAS, Cortland County strongly disagrees with the need to cut county funding so deeply when the Governor's budget proposes to fully fund its own reserves two years ahead of schedule by depositing $5.4 billion into reserves before the end of SFY 2023, while also projecting a general fund surplus of $35 billion by the end of SFY 2024, NOW THEREFORE

BE IT RESOLVED, that Cortland County calls on the State to continue to share these federal funds with counties as has been the precedent for over 20 years, AND BE IT FURTHER

RESOLVED, that the Clerk of the Cortland County Legislature shall forward copies of this resolution to the Governor of the State of New York, the New York State Legislature, the New York State Congressional Delegation, and all others deemed necessary and proper.

AGENDA ITEM NO. 5 – Amend 2023 Budget - Carryover Consolidated Appropriations Act for Nutrition Services Grant Funding - Area Agency on Aging

RESULT:	**APPROVED [UNANIMOUS]** **Next: 2/23/2023 6:00 PM**
MOVER:	Christopher Newell, Committee Vice Chair
SECONDER:	Mitchel Eccleston, Committee Member
AYES:	George Wagner, Christopher Newell, Beau Harbin, Mitchel Eccleston
EXCUSED:	Sandra Price, Linda Jones, Richard Stock

ON MOTION OF PRICE **RESOLUTION NO.**

Amend 2023 Budget - Carryover Consolidated Appropriations Act for Nutrition Services Grant Funding - Area Agency on Aging

WHEREAS, the New York State Office for the Aging has made available funds under HDC5 of the Consolidated Appropriations Act for Nutrition Services, for the period April 1, 2021 through September 30, 2023, for the purpose of COVID disaster relief services, AND

WHEREAS, the grant had funds in the amount of $1,516.15 remaining at the end of 2022, which need to be carried over to the 2023 budget in order to be expended within the remainder of the grant year, NOW THEREFORE BE IT

RESOLVED, that the 2023 County Budget be and hereby is amended as follows:

Increase:

Revenues:

A677444-44772-HDC5	Federal Aid	$1,516.15

Expenses:

A67745-52015-HDC5	Department Specific Equipment	$1,321.15
A67745-54040-HDC5	Association/Membership Dues	$195.00

AGENDA ITEM NO. 6 – Authorize Contracts/Delegate Authority - Use of Community Impact Dollars for HEALing Community Study - Mental Health Department

RESULT:	**APPROVED [UNANIMOUS]**
	Next: 2/23/2023 6:00 PM
MOVER:	Christopher Newell, Committee Vice Chair
SECONDER:	Mitchel Eccleston, Committee Member
AYES:	George Wagner, Christopher Newell, Beau Harbin, Mitchel Eccleston
EXCUSED:	Sandra Price, Linda Jones, Richard Stock

ON MOTION OF PRICE **RESOLUTION NO.**

Authorize Contracts/Delegate Authority - Use of Community Impact Dollars for HEALing Community Study - Mental Health Department

WHEREAS, the Cortland County Mental Health Department has been awarded $267,250 in one-time Community Impact Dollars (CID) as part of the Columbia HEALing Community Study (HCS), AND

WHEREAS, the HCS leadership committee has designated the funds to be used for funding evidence-based practices and communications interventions matching the approved action plan, AND

WHEREAS, it is the recommendation of the Health and Human Services Committee to authorize the Cortland County Administrator, Chair of the Cortland County Legislature's Health and Human Services Committee and the Director of Community Services for Cortland County to approve the designation of funds to various Cortland County contracted agencies, NOW THEREFORE BE IT

RESOLVED, that the Cortland County Administrator, Chair of the Cortland County Legislature's Health and Human Services Committee and the Director of Community Services for Cortland County will approve the designation of funds to various Cortland County contracted agencies, AND BE IT FURTHER

RESOLVED, that the County Administrator, upon review by the County Attorney or designee, be and hereby is authorized to execute agreements with approved county contracted agencies for these funds, AND BE IT FURTHER

RESOLVED, the Treasurer is authorized to pay the approved county contracted agencies from the appropriate expense account.

Referred from Judiciary & Public Safety Committee

Referred from Highway Committee

Referred from Government Operations Committee

Referred from Ag/Planning/Environmental Committee

AGENDA ITEM NO. 7 – Reallocate Salary Grade - Director of Planning

RESULT:	**APPROVED [UNANIMOUS]**
	Next: 2/23/2023 6:00 PM
MOVER:	Christopher Newell, Committee Vice Chair
SECONDER:	Beau Harbin, Committee Member
AYES:	George Wagner, Christopher Newell, Beau Harbin, Mitchel Eccleston
EXCUSED:	Sandra Price, Linda Jones, Richard Stock

ON MOTION OF HARBIN **RESOLUTION NO.**

Reallocate Salary Grade - Director of Planning

WHEREAS, the Personnel/Civil Service Office has reviewed the salary grade for Director of Planning in the Planning Department, AND

WHEREAS, there has been a change to the job duties for this position as reflected in the job description, AND

WHEREAS, it is recommended that the aforesaid position be reallocated from Grade 5 ($79,412-105,698) to Grade 3 ($91,771-122,148) in the Management Compensation Plan, NOW THEREFORE BE IT

RESOLVED, that the position of Director of Planning is hereby reallocated from Grade 5 to Grade 3 effective February 24, 2023.

MONTHLY REPORTS

1. Treasurer Monthly Report

RESULT:	**COMPLETED**

2. Real Property Tax Services Monthly Report

RESULT:	**COMPLETED**

DISCUSSION ITEMS

1. 2022 Sales Tax Comparison & Debt Service

RESULT:	**COMPLETED**

2. Volunteer Emergency Worker Tax Exemption

RESULT:	**COMPLETED**

3. Possible Changes to APE Committee Name, Duties and Oversight

RESULT:	**COMPLETED**

4. Municipal Use of American Rescue Plan Funding

RESULT:	**TABLED** **Next: 3/14/2023 10:00 AM**

Adjournment

The meeting was closed at 12:04 PM

Finance & Administration Committee

Committee Meeting

60 Central Ave
Cortland, NY 13045
http://www.cortland-co.org

~ Minutes ~

Tuesday, January 17, 2023 **10:00 AM** **Room 302**

CALL TO ORDER

The meeting was called to order at 10:17 AM by Committee Chair George Wagner

Attendee Name	Organization	Title	Status	Arrived
Sandra Price	Cortland County, NY	Committee Member	Present	
George Wagner	Cortland County, NY	Committee Chair	Present	
Linda Jones	Cortland County, NY	Committee Member	Present	
Christopher Newell	Cortland County, NY	Committee Vice Chair	Present	
Beau Harbin	Cortland County, NY	Committee Member	Present	
Richard Stock	Cortland County, NY	Committee Member	Present	
Mitchel Eccleston	Cortland County, NY	Committee Member	Present	
Kevin Fitch	Cortland County, NY	Chair of the Legislature	Remote	
Rob Corpora	Cortland County, NY	County Administrator	Present	
Savannah Hempstead	Cortland County, NY	Clerk of the Legislature	Present	
Ronald J. Van Dee	Cortland County, NY	Board Member	Present	
Joseph Nauseef	Cortland County, NY	Board Member	Present	
Scott Roman	Cortland County, NY	Director of Emergency Response and Communications	Present	
Andrea Herzog	Cortland County, NY	Director of Finance	Present	
Laura Fox	Cortland County, NY	Real Property Tax Services	Present	
John Banewicz	Cortland County, NY	County Treasurer	Present	
Elizabeth Larkin	Cortland County, NY	County Clerk	Present	
Paul Heider	Cortland County, NY	Board Member	Present	
Stephen Trobert	Cortland County, NY	Manager of Audit & Financial Projects	Present	
Patricia Dawson	Cortland County, NY	Deputy Clerk of the Legislature	Remote	
C. Withers			Remote	

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Sharon MacDougall	Cortland County, NY	Director of Community Services	Remote	
Eddie Velazquez	Cortland Standard	Reporter	Remote	

MINUTES

1. Finance & Administration Committee - Committee Meeting - Dec 13, 2022 10:00 AM

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Sandra Price, Committee Member
SECONDER:	Christopher Newell, Committee Vice Chair
AYES:	Price, Wagner, Jones, Newell, Harbin, Stock, Eccleston

RESOLUTIONS

AGENDA ITEM NO. 1 – Delegate Authority to the Manager of Audit and Financial Projects to Approve Payment of Real Property Tax Errors and Omissions Less Than $2500 through December 31, 2023

RESULT:	**APPROVED [UNANIMOUS]** **Next: 1/26/2023 6:00 PM**
MOVER:	Sandra Price, Committee Member
SECONDER:	Christopher Newell, Committee Vice Chair
AYES:	Price, Wagner, Jones, Newell, Harbin, Stock, Eccleston

ON MOTION OF WAGNER **RESOLUTION NO.**

Delegate Authority to the Manager of Audit and Financial Projects to Approve Payment of Real Property Tax Errors and Omissions Less Than $2500 through December 31, 2023

WHEREAS, Section 554 of the New York State Real Property Tax Law provides a mechanism for the correction of errors on Real Property Tax Rolls by the County Legislature based upon the recommendation of the Cortland County Director of Real Property Tax Services Agency pursuant to an application by an entitled person in cases involving clerical errors, unlawful entries or certain errors in essential fact, AND

WHEREAS, Section 554 of the New York State Real Property Tax Law authorizes the County Legislature to delegate to the Manager of Audit and Financial Projects the authority to approve such corrections in cases where the correction sought does not exceed twenty-five hundred dollars ($2,500), AND

WHEREAS, Section 556 of the New York State Real Property Tax Law provides a mechanism for the refunding of certain real property taxes by the County Legislature based upon the recommendation of the Cortland County Director of Real Property Tax Services Agency pursuant to an application by a taxpayer in cases involving clerical errors, unlawful entries upon the assessment rolls and certain errors in essential fact, AND

WHEREAS, said Section 556 of the Real Property Tax Law was amended to authorize the County Legislature to delegate to the Manager of Audit and Financial Projects the authority to approve such refunds in cases where the refund sought does not exceed twenty-five hundred dollars ($2,500), AND

WHEREAS, both sections also provide that the Manager of Audit and Financial Projects will report to the County Legislature, on a monthly basis, those refund applications which have been approved during the previous month and further provides that all applications which have been denied by the Director, in whole or in part, shall be forwarded to the County Legislature for disposition, NOW

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THEREFORE BE IT

RESOLVED, that pursuant to Sections 554 and 556 of the Real Property Tax Law, the County Legislature does hereby delegate to the Manager of Audit and Financial Projects the authority to approve corrections to the Real Property Tax Rolls and approve certain refunds of real property taxes as outlined in said Sections 554 and 556 of the Real Property Tax Law, in cases where the refund sought does not exceed the amount of twenty-five hundred dollars ($2,500), AND BE IT FURTHER

RESOLVED, that pursuant to section 554 and 556 of the New York State Real Property Tax Law that the Manager of Audit and Financial Projects shall provide a report on or before the 15th day of each month indicating the name of each recipient, location of the property and the amount of the correction and the amount of the refund or credit, AND BE IT FURTHER

RESOLVED, that this delegation of authority shall remain in effect through December 31, 2023.

AGENDA ITEM NO. 2 – Terminate Agreement with GovPayNet (AllPaid) and Authorize Agreement with Municipal Services Bureau (MSB) for Credit Card Services - County-Wide

RESULT:	**APPROVED [UNANIMOUS]**
	Next: 1/26/2023 6:00 PM
MOVER:	Mitchel Eccleston, Committee Member
SECONDER:	Richard Stock, Committee Member
AYES:	Price, Wagner, Jones, Newell, Harbin, Stock, Eccleston

ON MOTION OF WAGNER **RESOLUTION NO.**

Terminate Agreement with GovPayNet (AllPaid) and Authorize Agreement with Municipal Services Bureau (MSB) for Credit Card Services - County-Wide

WHEREAS, a contract with GovPayNet (AllPaid) to provide credit card services for the County has proven to be more expensive for County customers, AND

WHEREAS, GovPayNet does not offer point of sale technology using advanced and secure devices, AND

WHEREAS, the contract with GovPayNet requires a 30 day termination notice, AND

WHEREAS, MSB has agreed to provide credit card services for multiple departments at a lower percentage rate than the current provider, which will benefit all County residents who transact business with Cortland County using a credit card, NOW THEREFORE BE IT

RESOLVED that the Cortland County Legislature authorize the termination of the contract with GovPayNet, AND BE IT FURTHER

RESOLVED that the Cortland County Legislature authorizes the County Administrator, upon review and approval of the County Attorney or designee, to sign a Merchant Agreement with MSB to provide credit card services.

AGENDA ITEM NO. 3 – Amend 2023 Budget for Office Supplies & Postage - Real Property Tax Services

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RESULT:	**APPROVED [UNANIMOUS]**
	Next: 1/26/2023 6:00 PM
MOVER:	Christopher Newell, Committee Vice Chair
SECONDER:	Sandra Price, Committee Member
AYES:	Price, Wagner, Jones, Newell, Harbin, Stock, Eccleston

ON MOTION OF WAGNER **RESOLUTION NO.**

Amend 2023 Budget for Office Supplies & Postage - Real Property Tax Services

WHEREAS, the Real Property Tax Services Department is requesting an increase in funding for mandatory second notice mailing for senior citizen exemption, AND

WHEREAS, this new requirement was signed into law after the 2023 budget was passed, AND

WHEREAS, the Finance and Administration Committee recommends this budget amendment, NOW THEREFORE BE IT

RESOLVED, that the 2023 County Budget be amended to show an increase in funding to the accounts below from the Cortland County General Fund as follows:

Increase:

A13555.54005	Office Supplies	$2,000
A13555.54020	Postage	$8,150
A359900	Appropriated Fund Balance	$10,150

CONSENT AGENDA - Items on the Consent Agenda have been endorsed by the various standing committees. Finance & Administration Committee Members may request any item be pulled from the consent agenda for further discussion and separate vote.

Referred from Ag/Planning/Environmental Committee

AGENDA ITEM NO. 1 – Reallocate Salary Grade - Director of Planning

RESULT:	**FAILED [3 TO 4]**
MOVER:	Christopher Newell, Committee Vice Chair
SECONDER:	Beau Harbin, Committee Member
AYES:	Christopher Newell, Beau Harbin, Mitchel Eccleston
NAYS:	Sandra Price, George Wagner, Linda Jones, Richard Stock

ON MOTION OF HARBIN **RESOLUTION NO.**

Reallocate Salary Grade - Director of Planning

WHEREAS, the Personnel/Civil Service Office has reviewed the salary grade for Director of Planning in the Planning Department, AND

WHEREAS, there has been a change to the job duties for this position as reflected in the job description, AND

WHEREAS, it is recommended that the aforesaid position be reallocated from Grade 5 ($79,412-

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105,698) to Grade 3 ($91,771-122,148) in the Management Compensation Plan, NOW THEREFORE BE IT

RESOLVED, that the position of Director of Planning is hereby reallocated from Grade 5 to Grade 3 effective January 26, 2023.

Referred from Building & Grounds Committee

AGENDA ITEM NO. 2 – Award Bid/Authorize Contract for Sprinkler System Testing, Certification and Repair - Buildings & Grounds

RESULT:	**APPROVED [UNANIMOUS]**
	Next: 1/26/2023 6:00 PM
MOVER:	Christopher Newell, Committee Vice Chair
SECONDER:	Mitchel Eccleston, Committee Member
AYES:	Price, Wagner, Jones, Newell, Harbin, Stock, Eccleston

ON MOTION OF HEIDER **RESOLUTION NO.**

Award Bid/Authorize Contract for Sprinkler System Testing, Certification and Repair - Buildings & Grounds

WHEREAS, Cortland County solicited proposals for the inspection, certification and repair of its sprinkler systems for a five year term, AND

WHEREAS, Cortland County received proposals from the following:

Davis Ulmer Fire Protection of Liverpool, New York:

Annual Inspection and Certification:
2023-$4,960
2024-$3,720
2025-$3,720
2026-$5,120
2027-$3,840

Hour Rate for service and repair:
2023-$130 per hour
2024-$135 per hour
2025-$140 per hour
2026-$145 per hour
2027-$150 per hour

Petcosky Fire Protection of Vestal, New York:

Annual Inspection and Certification:
2023-$2,115
2024-$2,115
2025-$2,115
2026-$2,115
2027-$2,115

Hourly Service Rates:
Hourly per man (7am-4pm) $130.00

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Overtime labor per man $160.00
Sunday/Holiday labor per man $190.00
Service call fee (1-4 hour response) $95.00

, AND

WHEREAS, based upon the results of the bid, the Building and Grounds Committee recommends that the bid be awarded to the lowest responsible bidder, AND

WHEREAS, it would be in the best interest of Cortland County to enter into an agreement with Petcosky Fire Protection of Vestal, NY, for the inspection, certification and repair of its sprinkler systems, NOW THEREFORE BE IT

RESOLVED, that the Cortland Legislature hereby authorizes the County Administrator, upon review and approval of the County Attorney or Designee, to enter into an agreement with Petcosky Fire Protection of Vestal, NY for the inspection, certification and repair of its sprinkler systems, AND BE IT FURTHER

RESOLVED that the cost shall be as shown above annually and will be paid out of account A16205.54015.

AGENDA ITEM NO. 3 – Award Contracts - 22 West Court Street Renovations

RESULT:	**APPROVED [UNANIMOUS]**
	Next: 1/26/2023 6:00 PM
MOVER:	Christopher Newell, Committee Vice Chair
SECONDER:	Mitchel Eccleston, Committee Member
AYES:	Price, Wagner, Jones, Newell, Harbin, Stock, Eccleston

ON MOTION OF HEIDER **RESOLUTION NO.**

Award Contracts - 22 West Court Street Renovations

WHEREAS, the Cortland County Buildings and Grounds Committee is desirous of renovating 22 West Court Street for use as the County's Department of Emergency Response & Communications facility, AND

WHEREAS, Cortland County has solicited proposals from various qualified vendors for a General Contractor, Electrical Contractor, Plumbing Contract and HVAC Contractor for the project, AND

WHEREAS the following bid results were submitted to the Clerk of the County Legislature on December 15, 2022 as required by the request for proposals posted on the County website and at various contractor plan rooms in New York State:

Electric	Base Bid	generator	gate control	Fire alarm	Combined bid
Matco Electric	$144,600.00	$4,820.00	$4,500.00	$13,900.00	$167,820.00
Beard Electric	$151,292.66	$11,673.89	$2,720.47	$12,546.31	$178,233.33
Patricia Electric	$156,000.00	$26,000.00	$1,850.00	$13,300.00	$197,150.00
Ridley Electric	$160,500.00	$20,000.00	$5,000.00	$22,600.00	$208,100.00
Myraid Electric	$178,000.00	$14,300.00	$8,300.00	$12,400.00	$213,000.00
Diekow Electric	$197,700.00	$18,000.00	$8,000.00	$21,500.00	$245,200.00
Knapp Electric	$214,000.00	$28,500.00	$6,300.00	$22,000.00	$270,800.00

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Plumbing		**generator NG**		
Slavic & Company	$73,000.00	$9,000.00		$82,000.00
Picciano & Son	$80,300.00	$1,250.00		$81,550.00
NJ Graham	$81,900.00	$4,800.00		$86,700.00
John Danforth	$135,200.00	$2,575.00		$137,775.00
HVAC				
Slavic & Company	$496,000.00			$496,000.00
King & King	$525,375.00			$525,375.00
Picciano & Son	$654,397.00			$654,397.00
John Danforth	$794,880.00			$794,880.00
General Contractor		**Generator**	**Site Work**	
McGinnis Nelson	$400,000.00	$5,000.00	$166,500.00	$571,500.00
Daniel Lynch	$652,000.00	$4,500.00	$202,000.00	$858,500.00
Bouley Associates	$727,000.00	$10,000.00	$250,000.00	$987,000.00

, AND

WHEREAS, based upon the results of the bid, the Building and Grounds Committee recommends that the bid be awarded to the lowest responsible bidder, AND

WHEREAS, it would be in the best interest of Cortland County to contract with McGinnis Nelson Construction, 4833 Appletree Ridge Road, Manlius, NY 13104 for General Contractor Services at 22 West Court Street for the total proposed amount of $571,500, AND

WHEREAS, it would be in the best interest of Cortland County to contract with Matco Electric, 3913 Gates Road, Vestal, NY 13850 for the Electrical Contractor Services at 22 West Court Street for the total proposed amount of $167,820, AND

WHEREAS, it would be in the best interest of Cortland County to contract with Slavic and Company, Inc., 85 Main Street, Johnson City, NY 13790 for the HVAC Contractor Services at 22 West Court Street for the total proposed amount of $496,000, AND

WHEREAS, it would be in the best interest of Cortland County to contract with Slavic and Company, Inc., 85 Main Street, Johnson City, NY 13790 for the Plumbing Contractor Services at 22 West Court Street for the total proposed amount of $73,000, AND

RESOLVED, that the Cortland Legislature hereby authorizes the County Administrator, upon review and approval of the County Attorney or designee, to enter into an agreement with McGinnis Nelson Construction of 4833 Appletree Ridge Road, Manlius, NY 13104, for General Contractor services at 22 West Court Street for the total proposed amount of $571,500, AND BE IT FURTHER

RESOLVED, that the Cortland Legislature hereby authorizes the County Administrator, upon review and approval of the County Attorney or designee and subject to funding by the Cortland County Legislature, to enter into an agreement with Matco Electric of 3913 Gates Road, Vestal, NY 13850, for the Electrical Contractor Services at 22 West Court Street for the total proposed amount of $167,820, AND BE IT FURTHER

RESOLVED, that the Cortland Legislature hereby authorizes the County Administrator, upon

Minutes Acceptance: Minutes of Jan 17, 2023 10:00 AM (MINUTES)

review and approval of the County Attorney or designee and subject to funding by the Cortland County Legislature, to enter into an agreement with Slavic and Company, Inc. of 85 Main Street, Johnson City, NY 13790, for the HVAC Contractor Services at 22 West Court Street for the total proposed amount of $496,000, AND BE IT FURTHER

RESOLVED, that the Cortland Legislature hereby authorizes the County Administrator, upon review and approval of the County Attorney or designee and subject to funding by the Cortland County Legislature, to enter into an agreement with Slavic and Company, Inc. of 85 Main Street, Johnson City, NY 13790, for the Plumbing Contractor Services at 22 West Court Street for the total proposed amount of $73,000.

AGENDA ITEM NO. 4 – Authorize Contract - Construction Management - Renovations at 22 West Court Street

RESULT:	**APPROVED [UNANIMOUS]**
	Next: 1/26/2023 6:00 PM
MOVER:	Christopher Newell, Committee Vice Chair
SECONDER:	Mitchel Eccleston, Committee Member
AYES:	Price, Wagner, Jones, Newell, Harbin, Stock, Eccleston

ON MOTION OF HEIDER **RESOLUTION NO.**

Authorize Contract - Construction Management - Renovations at 22 West Court Street

WHEREAS, Cortland County has completed bidding of the renovations to 911 facilities on the property at 22 West Court Street, AND

WHEREAS, King and King Architects solicited pricing for construction management from several firms, with the majority of firms declining due to scheduling and staffing issues, AND

WHEREAS, King and King Architects is recommending Construction Associates, LLC of 2731 Brundage Rd, Baldwinsville, New York 13027, AND

WHEREAS, Cortland County's purchasing policy Section 5, Item 1 allows for bidding exemptions for professional services that require specialized expertise, AND

WHEREAS, Construction Associates, LLC is proposing a not to exceed fee of $70,000 for construction management for phase 4 of the renovations at 22 West Court Street, NOW THEREFORE BE IT

RESOLVED, the 2023 Department of Emergency Response & Communications budget is amended as follows:

Decrease:

A30205.51005	Personnel	$70,000

Increase:

A30205.54055	Professional Services	$70,000

, AND BE IF FURTHER

RESOLVED, that the County Administrator, upon approval of the County Attorney, or their

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designee, is hereby authorized to execute a contract with Construction Associates, LLC of 2731 Brundage Rd, Baldwinsville, New York 13027, for construction management of the renovations at 22 West Court Street.

AGENDA ITEM NO. 5 – Amend 2023 Budget/Authorize Funding for Restoration and Improvements to World War I Memorial in Courthouse Park

RESULT:	**APPROVED [UNANIMOUS]**
	Next: 1/26/2023 6:00 PM
MOVER:	Sandra Price, Committee Member
SECONDER:	Christopher Newell, Committee Vice Chair
AYES:	Price, Wagner, Jones, Newell, Harbin, Stock, Eccleston

ON MOTION OF HEIDER **RESOLUTION NO.**

Amend 2023 Budget/Authorize Funding for Restoration and Improvements to World War I Memorial in Courthouse Park

WHEREAS, the World War I Memorial in Courthouse Park is in need of restoration and improvements, AND

WHEREAS, work has begun to restore the monument and more funds are needed to finish the project, AND

WHEREAS, the Buildings and Grounds Committee recommends that the County provide the funding necessary to complete the project, NOW THEREFORE BE IT

RESOLVED, the Cortland County Legislature hereby authorizes the use of up to $22,000 to fund the restoration and improvements of the World War I monument in Courthouse Park, AND BE IT FURTHER

RESOLVED, the Legislature hereby amends the 2023 budget as follows:

Increase:

Account A16205.54076	Building Repairs & Maint.	$22,000
Account A359900	Appropriated Fund Balance	$22,000

Referred from Health & Human Services

AGENDA ITEM NO. 6 – Accept Resource Allocation Plan Funding - NYS Office of Children and Family Services - Youth Bureau

RESULT:	**APPROVED [UNANIMOUS]**
	Next: 1/26/2023 6:00 PM
MOVER:	Christopher Newell, Committee Vice Chair
SECONDER:	Mitchel Eccleston, Committee Member
AYES:	Price, Wagner, Jones, Newell, Harbin, Stock, Eccleston

ON MOTION OF PRICE **RESOLUTION NO.**

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Accept Resource Allocation Plan Funding - NYS Office of Children and Family Services - Youth Bureau

WHEREAS, the New York State Office of Children and Family Services, through the Resource Allocation Plan has made available the sum of $68,686 to Cortland County, AND

WHEREAS, the Cortland County Youth Bureau has designated the funds to the various Cortland County municipalities and agencies for the year 2023, a copy of which is kept on file in the County Youth Bureau Office, AND

WHEREAS, $51,686 will be allocated to Cortland County municipalities and $17,000 will be allocated to the Cortland County Youth Bureau administration, $17,000 which has already been budgeted, AND

WHEREAS, the 2023 County Budget will need to be amended as follows:

Revenue:		Current	Increase	Balance
A73125.43820.YB	Youth Bureau	$17,000	$51,686	$68,686

Expenditure:		Current	Inc/Dec	Balance
A73125.54815	Contracted Agencies	$0	$51,686	$51,686
			$51,686	

, NOW THEREFORE BE IT

RESOLVED, that the Chairman of the Legislature, upon review by the County Attorney or designee, be and hereby is authorized to execute the Resource Allocation Planning Agreement with the NY State Office of Children and Family Services and contracts with approved agencies, AND BE IT FURTHER

RESOLVED, that the Treasurer's office is authorized to pay from the appropriate expense account and that in the event that the county does not receive the appropriate funds from the NY State Office of Children and Family Services, the County shall not be liable to pay any of its own funds to meet any deficiency under the terms of the contract.

AGENDA ITEM NO. 7 – Extend Temporary Public Health Fellow Positions Public Health Fellow (4 Positions) and Public Health Fellow Coordinator – Health Department

RESULT:	**APPROVED [UNANIMOUS]**
	Next: 1/26/2023 6:00 PM
MOVER:	Christopher Newell, Committee Vice Chair
SECONDER:	Mitchel Eccleston, Committee Member
AYES:	Price, Wagner, Jones, Newell, Harbin, Stock, Eccleston

ON MOTION OF PRICE **RESOLUTION NO.**

Extend Temporary Public Health Fellow Positions Public Health Fellow (4 Positions) and Public Health Fellow Coordinator – Health Department

WHEREAS, Resolution No. 90-22 gave the Cortland County Health Department permission to enter into a grant with Health Research, Inc. for the NYS Public Health Corps (NYSPHC) Fellowship Program in the amount of $849,912 for the period of 9/1/21 - 7/31/23, AND

WHEREAS, Health Research, Inc. has extended the grant end date to 6/30/24 and awarded the

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Cortland County Health Department an additional $250,000, NOW THEREFORE BE IT

RESOLVED, that the Cortland County Legislature be and hereby approves the extension of the four (4) temporary Public Health Fellow positions (CSEA, Grade 16, $22.9307-29.0244/HR, competitive, with benefits) and one temporary Public Health Fellow Coordinator (CSEA, Grade 22, $28.4246-35.9782/HR, competitive, with benefits) to end 6/30/24, AND BE IT FURTHER

RESOLVED, the 2023 County budget will need to be amended as follows:

Account No.	**Description**	**Increase**
A40455.51005	Personnel	$125,414
A40455.52005	Office Equip	$12,000
A40455.54000	Phone	$624
A40455.54005	Office Supplies	$5,000
A40455.54015	Software/Maint Agree	$6,500
A40455.54035	Educ/Train	$25,000
A40455.54045	Travel	$5,000
A40455.54045	Program Supplies	$28,949
A40455.58020	Retirement	$17,558
A40455.58030	FICA	$9,594
A40455.58040	Workers Comp	$10,225
A40455.58060	Health Ins	$4,083
A40455.58062	Dental Ins	$53
TOTAL Expense		**$250,000**
A40455.43450 PHCF Revenue		$250,000

, AND BE IT FURTHER

RESOLVED, that the County Administrator and Public Health Director, upon review and approval by the County Attorney or designee, and subject to appropriation of the funding by the Legislature, is hereby authorized and directed to sign an agreement to accept these funds, AND BE IT FURTHER

RESOLVED, the Director of Finance shall carryover all unused grant funds to the subsequent year(s) budget covered by the grant, per the approved grant agreement.

Referred from Judiciary & Public Safety Committee

Referred from Highway Committee

Referred from Government Operations Committee

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MONTHLY REPORTS

1. Real Property Tax Services Monthly Report

RESULT:	COMPLETED

2. November Financials

RESULT:	COMPLETED

3. Treasurer Monthly Report

RESULT:	COMPLETED

DISCUSSION ITEMS

1. Tax Exemption for Volunteer Emergency Workers

RESULT:	COMPLETED

2. Municipal Emergency Reserve Fund

RESULT:	COMPLETED

Adjournment

The meeting was closed at 11:29 AM

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bell & spina
ARCHITECTS

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

ARCHITECTURE
BUILDING ENCLOSURE
COMMISSIONING
PLANNING

Request for Proposal

Architectural/Engineering to Accomodate Cortland City Courts' Occupation of Space Provided in the Cortland County Courthouse

21 November 2022
B&S Project Number: P22-00109

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Firm Overview **SECTION 1**
- NYS Certificate of Authority
- MWBE Certification (if applicable)

Key Personnel **SECTION 2**
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- Key License

Firm Experience **SECTION 3**

Fee/Timeline **SECTION 4**

Form: **SECTION 5**

- Exhibit A: Acknowledgement and Agreement to Comply w Standard Clauses for NYS Contracts
- Exhibit B: Drug Free Workplace
- Exhibit C: Non Collusive
- Exhibit D: Conflict of Interst
- Exhibit F: Qualification Questionnaire
- W-9
- Proof of Insurance
- References
- Litigation Statement

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20 November 2022

Cortland County Legislature
Cortland County Office Building
60 Central Avenue – Suite 306
Cortland, New York 13045

Attn: Savannah Hempstead, Clerk

Re: **RFP – Architectural/Engineering for:**
Planning, Design & Bid Documents for:
Renovations Required to Accommodate Cortland City Courts
In Space Provided in the Cortland County Courthouse

Dear Ms. Hempstead,

We are very much interested in continuing our stewardship of Cortland County historic courthouse. Projects completed at the Cortland County Courthouse include:

1989 DMV – (recipient of a CNY AIA interior design award)
1992 Court Renovations – (see enclosed newspaper article)
2001 Courthouse Electrical /Lighting
2005 Renovation to Room 330
2019 Courthouse Exterior Condition Study
2022 Exterior Main Entry Stair Replacement

We previously were the architects for the renovation of the City Courts in 1998. In 2004 we conducted a study to consolidate the City Courts into the county courthouse. The location proposed was the lower level of the courthouse that housed the DMV at the time.

Historic:
Bell & Spina has provided condition assessments and restorations of local, state and federal buildings often listed on the National Register of Historic Buildings. We provide our clients liaison communications with historic preservation entities and work within the guidelines of the Secretary of the Interior's Standards for the Treatment of Historic Properties. Recent historic projects include the Onondaga County War Memorial (Syracuse), New York State Armories (Statewide), Steele Hall (Syracuse University) and Morrill Hall (Cornell University).

Team:
Bell & Spina will provide team leadership, project management and architectural services. The project will be led by Dennis C. Spina, as the Project Manager. Rick Colson, will be Project Designer and technical consultations will be provided by Daniel Jackson, a licensed architect and National Park Service accredited historic consultant. Ram Tech Engineers (MBE) will be the mechanical / electrical engineering consultant. Atlantic Testing Laboratories (WBE) will conduct hazardous material testing and provide a sampling report. Bell & Spina can provide hazardous material abatement design should it be needed. Our subconsultant teammates have been selected for their talents and also our long-standing relationships with them, teaming on various projects across the State.

SYRACUSE (Headquarters)
215 Wyoming Street Office: 315.488.0377
Syracuse, NY 13204 Fax: 315.487.5947

ROCHESTER
1160-C Pittsford-Victor Rd. Office: 585.200.5038
Pittsford, NY 14534 Fax: 315.487.5947

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In summary we have the knowledge and background of City / County courts, historic restoration, and your courthouse.

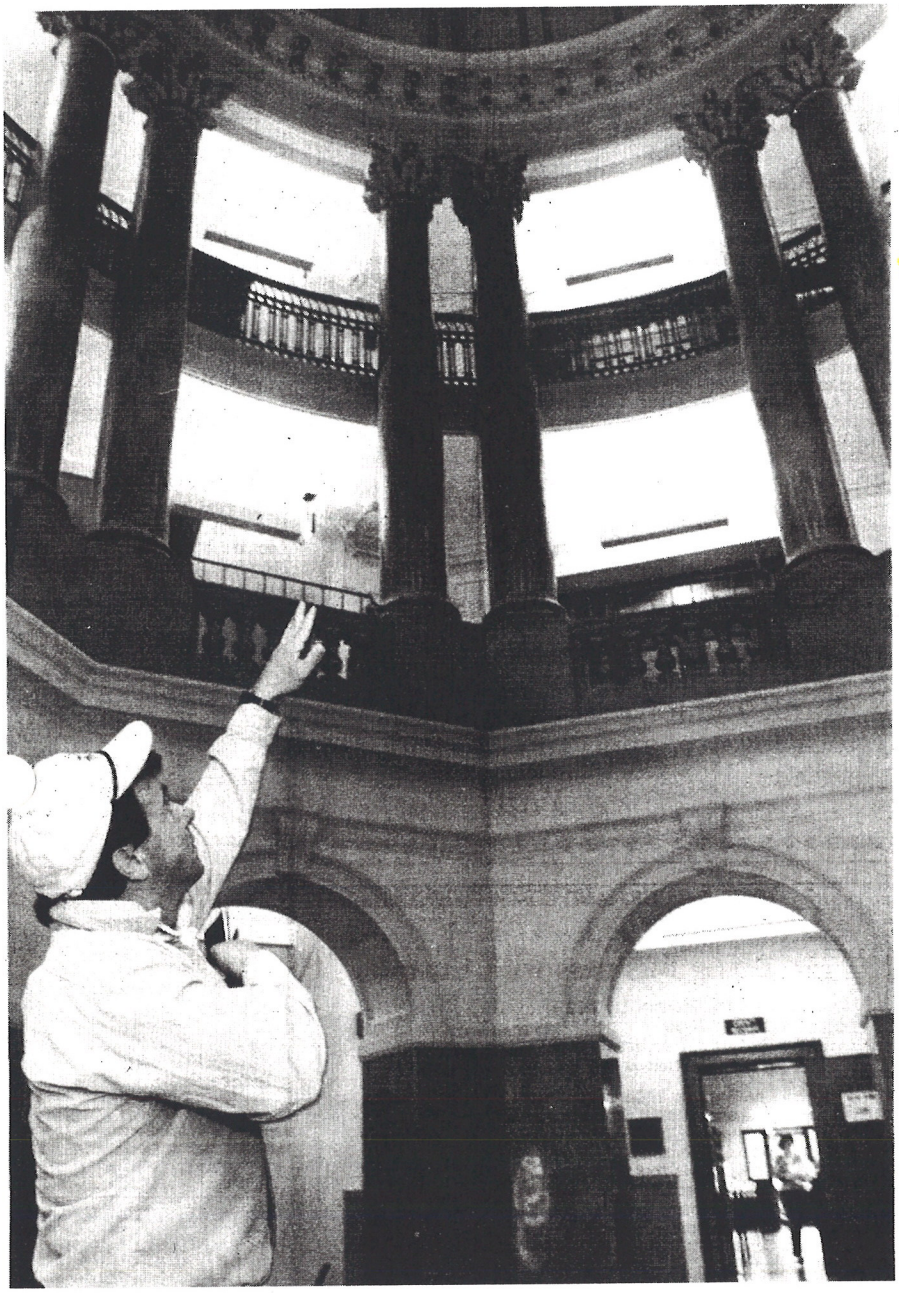
Should you have any questions or require additional information regarding our qualifications, I can be readily reached at the office at (315) 488-0377 or through email at dspina@bellandspina.com. Thank you for your consideration of our firm.

Sincerely,

BELL & SPINA, P.C.
Architects - Planners

Dennis Spina, AIA, RRC, REWC, REWO

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize



August Corsivo, clerk of the works for the Courthouse and Public Safety Building renovations, explains what work was done to the County Courthouse rotunda during a recent tour.

Employees Pleased With Courthouse Work

By CONNIE NOGAS

County Courthouse employees expressed satisfaction with the $1,090,355 renovation of the Courthouse which came in about $3,000 under budget.

Begun in December 1990, the project is "99 percent complete" and should be totally finished within the next week or so, said Nick Gigante, project architect and an employee of Bell & Spina, a Camillus-based architectural firm handling the project. At least $3,000 of the original $1,090,355 contract will be left over.

Work mainly consisted of revamping court chambers and offices, renovating the main courtroom, and modernizing the 1920s era building. Other offices that were worked on include the County Clerk's Office on the first floor, and the second floor offices of the District Attorney, Family Court chambers, and grand jury hearing room.

There is now new space for the Board of Elections Office which was formerly located in the County Office Building. The offices of Stop DWI and Veterans Services, which formerly occupied the space now occupied by the Board of Elections, have been moved to the other side of the first floor. Other improvements include a new electrical system, sprinkler system, air conditioning system, fire doors, and a first-floor employee lounge.

The project did not include repairing the building's cracked columns or painting the dome of the rotunda since that extra work could cost up to $200,000, said Frank Barbieri, R-McGraw, who chaired the Buildings and Grounds Committee until last year when he was replaced by Thomas Williams, R-Homer.

Barbieri said he would not be surprised if legislators decided to tackle the columns and the rest of the rotunda this year. However, he was satisfied with the painting of the rotunda's walls which was included as part of the project and believes no other work needs to be done on the rotunda.

"It's an extremely beautiful work of art. The way I look at it, I don't think it needs anything. Leave it be until the county has more revenue to cope with these situations," said Barbieri, a frequent critic of county spending.

County Probation Director James Cunningham agreed with Barbieri.

"I think the rotunda looks great. They did a beautiful job," he said.

While Cunningham was impressed with the job, he did complain about a noisy air conditioning unit located outside his offices. However, that problem will be taken care of by planting shrubs around the area which should muffle the sound, said August Corsivo, clerk of the works for both the courthouse renovation and public safety building renovation project which is now being done to the old jail on Greenbush Street.

Another minor complaint voiced by some employees was the lack of carpeting on the main courtroom which now echoes. However, the problem could be corrected by adding some carpeting which could cost $1,000 or more depending on how much space was carpeted, Barbieri said.

But Courthouse employees and legislators alike were generally satisfied with the project, including the main courtroom renovations.

"The courtroom is gorgeous. Just absolutely gorgeous," said County Historian Shirley Heppell, who also enjoys her new office which has more storage space than her old one.

"With the limited resources they had, they did a good job," said Chris Esworthy, chief clerk of Supreme and County Courts, referring to the budget constraints the contractors worked under.

"Our offices came out great," he added.

Kelly Preston, second deputy clerk under County Clerk Judith Riehlman, agreed.

"I think it's terrific. It's just beautiful," she said, describing the County Clerk's office renovations.

While Williams has only been chairman of the Buildings and Grounds Committee for barely two months, he too was impressed with the project.

"The comments that I have heard are basically all favorable," Williams said. "From my perspective, it's very well-run and achieved the purpose" of upgrading the building.

The Cortland Standard
February 14, 1992

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

SECTION ONE

FIRM OVERVIEW

HISTORY

Bell & Spina was founded on the premise that by providing a high level of service, we would develop long term client relationships, meeting our service and trust standards when treated as an extension of our clients' organizations. We take time to listen and understand our client's needs and concerns. We approach your building project with a lasting concern for its performance and meeting your needs. Consequently those we service intend to keep their assets in good repair for the long term; mainly secondary (K-12) education, higher education (both public and private), government entities and select private clients.

Established in 1987 as successor to Cappuccilli-Bell Architects (1977) and J. Anthony Cappuccilli Architects (1965), Bell & Spina is a professional design firm comprised of architects, building enclosure specialists, and planners. Throughout the years the firm has worked on numerous complex projects specific to roofing and building enclosure.

Our firm is organized into four focus areas of practice:

ARCHITECTURE

As architects we offer full services, partnering with our clients to explore and provide options and information so that they can make informed decisions. Our philosophy is one of sustainability, coupling good design with our technical expertise to create lasting structures. We take a long term approach with stewardship for our client's resources in mind.

BUILDING ENCLOSURE

As registered roof and exterior wall consultants, we provide specialized expertise to diagnose and design mitigation solutions for building envelope issues. IIBEC is an international nonprofit organization whose professional members offer unbiased design, repair planning, quality assurance, legal testimony and general roofing, waterproofing, and exterior wall services. Consistent with this mission, Bell & Spina addresses all six sides of the building enclosure for a variety of clients including other design firms and legal professionals.

COMMISSIONING

As commissioning agents, we plan the performance criteria and/or evaluate the building enclosure systems verifying the extent to which they can achieve their intended level of performance. Building Enclosure Commissioning (BECx) is becoming increasingly recognized by energy conscious clients and is a natural extension of our building enclosure expertise.

PLANNING

As planners, we work with clients to identify specific needs which translate into strategic plans, taking client and project parameters into consideration. Whether the project requires a fast-track solution or a phased long-term approach, our planning experience provides the framework for its implementation.

bell & spina
ARCHITECTS

ARCHITECTURE
BUILDING ENCLOSURE
COMMISSIONING
PLANNING

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

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info@bellandspina.com

ARCHITECTURE

BUILDING DESIGN AND CONSTRUCTION

The practice of architecture, at the very basic level, is about shelter from the elements and about the people who inhabit, work and play in and around buildings in the context of the environment.

As Architects, our goal is to find the best design solutions to meet our client's needs within their budget, blending a design that will endure the test of time with the most appropriate materials in terms of durability, use and visual expectations. Bell & Spina views each project as an opportunity to help our clients select the best alternative with concern for sustainability, budget and aesthetics.

Interior Renovation

A successfully delivered project is within budget and on schedule. Bell & Spina's historically low average change order rate of 1.5% attests to our comprehensive project delivery process and contract document quality. Our project managers remain with our clients from inception through completion.

AREAS OF EXPERTISE

- ADDITION / ALTERATION / RENOVATION
- PRESERVATION / RESTORATION / ADAPTIVE REUSE
- CONSTRUCTION ADMINISTRATION
- CONTRACT DOCUMENT PREPARATION
- INTERIOR DESIGN
- BUILDING CONDITION STUDY
- LEED / SUSTAINABLE DESIGN
- HAZARDOUS MATERIALS SURVEY & ABATEMENT DESIGN
- HYGROTHERMAL ANALYSIS
- LIFE SAFETY & CODE REVIEW
- LITIGATION / CLAIM SUPPORT
- COST, LIFE CYCLE & BUDGET ANALYSIS
- VALUE ENGINEERING
- SIGNAGE & GRAPHICS

Exterior Rehabilitation

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

The University of the State of New York
THE STATE EDUCATION DEPARTMENT
Albany, New York 12230

Pursuant to the provisions of Section 1503 of the Business Corporation Law, I hereby certify th each of the individuals named below, who are all of the persons named in the attached Certificate Incorporation of BELL & SPINA, ARCHITECTS-PLANNERS, P.C.

a proposed professional service corporation, as the original shareholders, directors and officers theree is authorized by law to practice the profession set forth after his name.

I further certify that if such corporation will be authorized by law to practice more than o profession, one or more of such individuals is authorized to practice each profession which su proposed corporation will be authorized to practice.

THE ISSUANCE OF THIS CERTIFICATE DOES NOT CONSTITUTE APPROVAL OF TH CORPORATION NAME BY THE DEPARTMENT OF STATE.

NAME & RESIDENCE ADDRESS	PROFESSION	LICENSE OR CERTIFICATE NO.
Gary J. Bell 201 Farmington Drive Camillus, NY 13031	Architecture	009045
Dennis C. Spina 725 Idlewood Blvd. Baldwinsville, NY 13027	Architecture	014303

SEAL

IN WITNESS WHEREOF, I have hereunto set my hand in the city of Albany this 5 day of April 1989

Konrad Ranger III
Supervisor of Professional Licensing

PLS 709
1/80

3

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

RAM-TECH ENGINEERS

FIRM PROFILE

RAM-TECH Engineers, strategically located in Syracuse and Buffalo, New York, is a consulting engineering firm that specializes in providing complete heating, ventilating and air conditioning, plumbing, fire protection, electrical, security, telecommunication and special systems engineering and design services.

The firm's capabilities and significant expertise in these areas includes the preparation of facility surveys and evaluations, energy audits, master plans, final design, cost estimating, construction review and construction administration. Clientele include Federal, State and Local Governmental agencies, libraries, healthcare facilities, correctional facilities, schools, colleges and universities, as well as industrial and commercial businesses.

RAM-TECH's team is dedicated to creating sustainable buildings by optimizing energy performance, building automation system design, advanced mechanical, electrical and plumbing design and commissioning systems for total building effectiveness. The firm provides quality engineering services while meeting client schedules and budgets. The firm is focused on the collaborative team effort that creates environmentally responsible, profitable and healthy places to live and work. RAM-TECH's ability to meet and often exceed our clients' needs is actively demonstrated by receiving over 80% of our new work from previous clients.

The Firm's Principal is Mr. Ravi Raman. The professional and technical staff consists of over twenty experienced individuals, each well qualified in their respective fields of expertise. Engineering Services provided by the firm include:

- Long Range Planning
- Feasibility Analysis
- Project Planning
- Basis-Of-Design Reports
- System Analysis
- Final Design
- Bid Documents
- Construction Review
- Construction Observation
- Contract Administration

The following are specific areas of design that our staff has provided to a wide range of satisfied clients:

MECHANICAL ENGINEERING

Heating | Ventilating | Air Conditioning
Indoor Air Quality | Energy Management
Clean Rooms | Isolation Rooms
Energy Conservation Audits | Energy Recovery
Humidity Control | Dust Collection
Geothermal Heat Pumps

PLUMBING & FIRE PROTECTION ENGINEERING

Fire Protection | Storm Water | Domestic Water
Grey Water Supply | Pressure Booster Systems
DI & RO Water Supply
Soil & Waste Storm Water Reclamation
Water Conditioning, Filtration & Treatment

SPECIAL SYSTEMS

Telephone | Security | Communication
Fire Alarm | Life Safety | Public Address
Medical Gas | Fuel Supply | Uninterruptable Power
Low Voltage Control

ELECTRICAL ENGINEERING

Distribution Substation (To 115kv)
Transmission (To 115kv) | Load Management
Building Power Lighting (Indoor & Outdoor)
SCADA | Standby/Emergency Generation
Co-Generation | Distributed Generation

ENVIRONMENTAL SERVICES

Underground Storage Tank Remediation & Replacement
Site Environmental Impact Studies & Assessments
Indoor Air Quality Testing & Remediation

ADDITIONAL SERVICES

Architectural | Continuing Education
Building Systems Code Review
Emergency Engineering Assistance
Food Service Engineering & Design
Utilities Deregulation Support
Design-Build via Raman & Borick Technical Services

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland

NEW YORK STATE

MINORITY- AND WOMEN-OWNED BUSINESS ENTERPRISE ("MWBE")

CERTIFICATION

Empire State Development's Division of Minority and Women's Business Development grants a

Minority Business Enterprise (MBE)

pursuant to New York State Executive Law, Article 15-A to:

Ram-Tech Engineers PC

Certification Awarded on: December 20, 2019
Expiration Date: December 20, 2022
File ID#: 4206

NEW YORK STATE OF OPPORTUNITY. Division of Minority and Women's Business Development

A Division of Empire State Development

THE UNIVERSITY OF THE STATE OF NEW YORK
EDUCATION DEPARTMENT

THIS IS TO CERTIFY THAT HAVING MET THE REQUIREMENTS OF SECTION 7210 OF THE EDUCATION LAW AND IN ACCORDANCE THEREWITH THIS CERTIFICATE OF AUTHORIZATION IS GRANTED WHICH ENTITLES

RAM-TECH ENGINEERS OF SYRACUSE PC
6100 FAIRWAY DRIVE
PO BOX 10
SYRACUSE, NY 13211-0010

TO PROVIDE PROFESSIONAL ENGINEERING SERVICES IN THE STATE OF NEW YORK FOR THE PERIOD 11/01/2021 TO 10/31/2024.

CERTIFICATE NUMBER
0019109

BETTY ROSA
COMMISSIONER OF EDUCATION

Attachment: BID - City Court Relocation - Bell and Spina

ATL PROFILE

Atlantic Testing Laboratories, Limited (ATL)

Contact			
Name:	Andrew S. Amell		
Title:	Senior Project Manager		
Address:	6085 Court Street Road, Suite A Syracuse, NY 13206		
Phone:	315-699-5281		
E-mail:	aamell@atlantictesting.com		
Corporate Information			
Firm Type:	Corporation		
Incorporation:	July 3, 1978, New York State		
Year Organized:	1967	**In Business:**	55 years
FEIN:	16-1109111		
# of Employees:	260		
WBE Certifications/Approvals			
New York State, Massachusetts, New Jersey, Port Authority of NY/NJ, DASNY, City of Albany, City of Syracuse, New York City			

State Registrations
New York
Connecticut
Vermont
Maine
New Hampshire
New Jersey
Massachusetts
Pennsylvania
Services Performed
Subsurface Investigation
Water-Based Investigation
Geotechnical
Environmental
Special Inspection
Construction Materials Testing
Laboratory Testing
Non-Destructive Examination and Testing

ATL Engineering, P.C. was established to comply with New York State Education Law requirements for providing professional engineering services. The company provides a variety of engineering services to complement ATL's technical support services, maintaining a reciprocal subconsultant arrangement.

ATL Engineering, PC (AE)

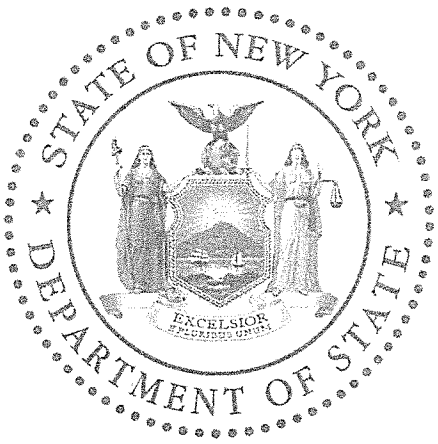
Contact			
Name:	James J. Kuhn, PE		
Title:	President		
Address:	22 Corporate Drive Clifton Park, NY 12065		
Phone:	518-383-9144		
E-mail:	jkuhn@atlantictesting.com		
Corporate Information			
Firm Type:	Corporation		
Incorporation:	May 30, 2006, New York State		
Year Organized:	2006	**In Business:**	15 years
FEIN:	20-5048658		

State Registrations
New York
Connecticut
Vermont
Services Performed
Geotechnical Engineering
Pavement Engineering
Foundation Design
Construction Materials Engineering
Special Inspection PE Oversight
Environmental Engineering

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

State of New York
Department of State } ss:

I hereby certify, that the Certificate of Incorporation of ATLANTIC TESTING LABORATORIES, LIMITED was filed on 07/03/1978, with perpetual duration, and that a diligent examination has been made of the Corporate index for documents filed with this Department for a certificate, order, or record of a dissolution, and upon such examination, no such certificate, order or record has been found, and that so far as indicated by the records of this Department, such corporation is an existing corporation.



***

WITNESS my hand and the official seal of the Department of State at the City of Albany, this 12th day of February two thousand and twenty-one.

Brendan C Hughes

Brendan C Hughes
Executive Deputy Secretary of State

202102160418 03

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

WBE CERTIFICATIONS

Atlantic Testing Laboratories maintains its status as a Women-Owned Business Enterprise (WBE) with the following states, authorities, and cities:

New York State	Port Authority of NY/NJ	City of Albany
Massachusetts	DASNY	City of Syracuse
New Jersey		New York City

NEW YORK STATE

MINORITY- AND WOMEN-OWNED BUSINESS ENTERPRISE ("MWBE")

CERTIFICATION

Empire State Development's Division of Minority and Women's Business Development grants a

Women Business Enterprise (WBE)

pursuant to New York State Executive Law, Article 15-A to:

Atlantic Testing Laboratories, Limited

Certification Awarded on: July 10, 2018
Expiration Date: July 10, 2023
File ID#: 58616

NEW YORK STATE OF OPPORTUNITY. Division of Minority and Women's Business Development

A Division of Empire State Development

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

Department of State

Existing Corporations and Businesses ▸ *Corporation & Business Entity Database Search*

Selected Entity Name: ATLANTIC TESTING LABORATORIES, LIMITED

Selected Entity Status Information

Current Entity Name: ATLANTIC TESTING LABORATORIES, LIMITED
DOS ID #: 498322
Initial DOS Filing Date: JULY 03, 1978
County: ST. LAWRENCE
Jurisdiction: NEW YORK
Entity Type: DOMESTIC BUSINESS CORPORATION
Current Entity Status: ACTIVE

Selected Entity Address Information

DOS Process (Address to which DOS will mail process if accepted on behalf of the entity)
ATLANTIC TESTING LABORATORIES, LIMITED
6431 US HWY 11
CANTON, NEW YORK, 13617

Chief Executive Officer
MARIJEAN B REMINGTON
6431 US HIGHWAY 11
CANTON, NEW YORK, 13617-0029

Principal Executive Office
ATLANTIC TESTING LABORATORIES, LIMITED
6431 US HIGHWAY 11
CANTON, NEW YORK, 13617-0029

Registered Agent
NONE

This office does not record information regarding the names and addresses of officers, shareholders or directors of nonprofessional corporations except the chief executive officer, if provided, which would be listed above. Professional corporations must include the name(s) and address(es) of the initial officers, directors, and shareholders in the initial certificate of incorporation, however this information is not recorded and only available by viewing the certificate.

***Stock Information**

# of Shares	Type of Stock	$ Value per Share
100000	Par Value	.01
100000	Par Value	.01
100000	Par Value	.01
20000	No Par Value	

*Stock information is applicable to domestic business corporations.

Name History

Filing Date	Name Type	Entity Name
JUL 03, 1978	Actual	ATLANTIC TESTING LABORATORIES, LIMITED

A **Fictitious** name must be used when the **Actual** name of a foreign entity is unavailable for use in New York State. The entity must use the fictitious name when conducting its activities or business in New York State.

NOTE: New York State does not issue organizational identification numbers.

Search Results New Search

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

SECTION TWO

STAFF LICENCES / CERTIFICATIONS

Members of: AIA, ASTM, CSI, IIBEC (formerly RCI), NRCA, USGBC

Staff Certifications:

- 11 Licensed Architects
- 1 Licensed Structural Engineer
- 3 Registered Roof Consultants (RRC) out of 10 in NYS
    - Registered Roof Consultants (RRCs) are independent roofing experts with industry-wide knowledge of materials performance and design requirements. They stand apart from suppliers, product manufacturers and contractors. An RRC is knowledgeable of every facet of the roof construction process and serves as the building owner's councilor for matters pertaining to both existing and new construction.
- 2 Registered Exterior Wall Consultants (REWC) out of 4 in NYS
    - The Registered Exterior Wall Consultant (REWC) has demonstrated the knowledge, skills and abilities to provide impartial, informed consulting and documentation related to the investigation, design, construction and repair, testing, and codes and standards of exterior wall systems. The REWC must have proficient knowledge of wall drainage systems, different exterior wall cladding systems, various fenestration assemblies, proper selection of sealants and the forces imposed on exterior wall systems.
- 1 Registered Exterior Wall Observer (REWO)
    - Exterior Wall Quality Assurance Observers monitor the construction process to assure that projects remain in compliance with approved construction drawings, specifications, and best-practice or warranty-stipulated installation procedures. An REWO is an impartial on-site inspector for the design team. The observer's vigilance helps keep construction on track with milestone tasks, deadlines and budget.
- 3 LEED Accredited Design Professionals
- 1 WELL Accredited Design Professionals
- 1 CPHD Passive House Accredited Professional
- 1 Accredited Building Enclosure Commissioning Process Provider (BECxP)
- 1 Accredited Commissioning Authority + Building Enclosure (CxA+BE)
- 1 NPS Qualified Historical Architect: NPS 36CFR61
- 3 DOL Asbestos Project Designers
- 1 DOL Asbestos Inspectors
- 5 Certified Thermographers

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

SYRACUSE (Headquarters)
215 Wyoming Street Office: 315.488.0377
Syracuse, NY 13204 Fax: 315.487.5947

ROCHESTER
1160-C Pittsford-Victor Rd. Office: 585.200.5038
Pittsford, NY 14534 Fax: 315.487.5947

www.bellandspina.com | info@bellandspina.com

DENNIS C. SPINA, AIA, RRC, REWC, REWO

PROJECT MANAGER

bell & spina ARCHITECTS

Since 1974, Dennis has been providing architectural design and administration services for projects for K-12 and Higher Education, Commercial, Healthcare, Municipal, Correctional, and Not-for-Profit clients. His diverse expertise encompasses building enclosure forensics, interior renovations and planning/programming. Dennis is a Registered Roof (RRC), Exterior Wall (REWC) and Exterior Wall Observer (REWO) through IIBEC Inc. (formerly RCI. Inc.) , and is also NYS DOL/AHERA Asbestos Project Designer.

EDUCATION / CERTIFICATIONS

Bachelor of Architecture, Syracuse University, 1974
- Minor Course Study in Gerontology

IIBEC/ International Institute of Building Enclosure Consultants (formerly RCI, Inc.)
- Registered Roof Consultant (RRC)
- Registered Exterior Wall Consultant (REWC)
- Registered Exterior Wall Observer (REWO)

NYS DOL/AHERA Asbestos Project Designer

ARCHITECTURAL REGISTRATION

New York - No. 14303
Massachusetts - No. 32246
Pennsylvania - No. RA406478
New Jersey - No. 21A102058500

RELEVANT EXPERIENCE

Cortland County, Cortland County Courthouse Renovations, Cortland, NY: (NR Listed)

In response to the Court Facilities Act, Cortland County retained the services of Bell & Spina to prepare a Court Facilities Capital Plan for the four story, 50,000 S.F. building. As Princeipal-in-Charge of the project a phased plan was designed to relocate the Department of Motor Vehicles to the old auditorium on the lower level of the Courthouse, along with restoration of the Court Room, District Attorney's Offices and Judges Chambers.

Onondaga County, Onondaga County Court House Historic Preservation & Adaptation, Syracuse, NY: (State Historic Listed)

Principal-in-Charge of the replacement of the built-up roof system, copper detailing and repair of the masonry elevator towers. As part of the project the building maintained its functions without disturbance during the construction and repairs, and the Courthouse–a landmark in Syracuse–maintained its historic integrity. The Onondaga County Courthouse is listed on the National Register of Historic Places.

Everson Museum of Art, Roof and Skylight Replacement, Syracuse, NY: (I.M. Pei Facility)

Principal-in-Charge to provide a long-term solution to the leaking skylights and to provide design services for a new roof. The solution designed involved replacing the existing skylights with a new window system that could withstand the seasonal building movement that was found to be the root cause of the repeated water infiltration. The project started in 2005 and was completed in 2007.

Syracuse University, Steele Hall Roof & Gutter Repairs, Syracuse, NY: (State Historic Listed)

As Principal-in-Charge of the project, it was discovered the original underlayment had deteriorated and was allowing water into the attic space. The yankee gutter lining had deteriorated and needed replacement as well. The existing clay tiles were tested and found to have significant life left in the materials. We removed and reinstalled the tile roof system after replacing the underlayments. Gutters were replaced with 20 oz. copper sloped to drain more efficiently and incorporated expansion joints. A heat trace system was installed within the gutter and down each leader to below grade. Masonry chimney was repointed. Flashings were replaced with zinc coated copper and then extended with 6lb. lead sheet to conform to the tiles.

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DENNIS C. SPINA, AIA, RRC, REWC, REWO

PROJECT MANAGER

RELEVANT EXPERIENCE

Onondaga County, Onondaga County War Memorial Roof Replacement, Syracuse, NY: (NR Listed)

Principal-in-Charge of the design and implementation of a sustainable replacement solution, which would not require many reroofing operations over the building's life. The solution developed included using zinc metal roofing in a roof recovery system over the dry insulation of the barrel vault roof, with an expected life span of 80 to 100 years. Gravel surfaced modified asphalt membrane roofing was installed on the flat roof areas. As a sustainable material, the zinc roofing system consists of recycled zinc, which can be recycled indefinitely, without loss of its physical or chemical properties after its useful life. Unlike lead roofing, zinc will not contaminate the ground water.

Onondaga County War Memorial, Balcony and Suite Addition/Renovation Syracuse, NY:

Principal-in-Charge for the design of luxury suites overlooking the ice at the Onondaga County historic War Memorial. Also included in the renovation was the adjacent assembly hall, now known as the "All Who Served Room" for Veterans. The remodel included six luxury suites, new finishes, a new bar and warming kitchen, two new upgraded bathrooms and the replacement of mechanical, electrical, plumbing and fire protection systems. Access to the luxury suites is from the "All Who Served Room".

Fowler High School Additions, Renovations & Site Improvements:

Principal-in-Charge for the additions and renovations to Fowler High School, which transformed the 1970s building into a more vibrant and modern learning environment, and divided 1,200 student population into smaller learning communities. The existing 195,000 square foot building was turned into four learning academies. Windows and skylights brought daylight into most classrooms for the first time. All renovated areas included complete new building, security and technology systems, and some areas underwent masonry and structural repairs. The project was a LEED Silver project.

Syracuse University, Sadler Hall Millwork, Syracuse, NY:

Principal-in-Charge for the design of built-in millwork prototypes for a potential building-wide millwork replacement. Pre-fabricated solutions for the various new millwork configurations that could ultimately be fabricated and installed efficiently and cost effectively were explored. As part of the design process, Bell & Spina constructed a series of 3D CAD models for each configuration type. This process allowed each of the seven different configurations to be quickly reviewed and subsequently modified by the University if desired.

Syracuse University, Gebbie Clinic Programming Analysis & Schematic Design, Syracuse, NY:

Principal-in-Charge for the relocation and consolidation of the entire Department of Communication Sciences & Disorders (+14,000 SF), into a single location in spaces directly adjacent to their existing research facility. The program included a clinical and therapy component for speech, language pathology & audiology, including evaluation of specific sound attenuation and technology requirements.

SUNY Oswego, Funnelle Hall, Oswego, NY:

Principal-in-Charge of the Funnelle Hall bathroom renovation. The focus of the project was to remove all existing original gang bathrooms on floors 2 thru 9 and reconfigure each wing with new single private bathrooms in the same location. The renovation created ADA accessible bathroom units and updated related mechanical, electrical, plumbing, fire protection and life-safety systems.

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

The University of the State of New York
Education Department
Office of the Professions
REGISTRATION CERTIFICATE
Do not accept a copy of this certificate

License Number: 014303-01 Certificate Number: 0988113

SPINA DENNIS C
1987 COLLARD ROAD
SKANEATELES NY 13152-0000

is registered to practice in New York State through 08/31/2023 as a(n)
ARCHITECT

LICENSEE/REGISTRANT

EXECUTIVE SECRETARY

INTERIM COMMISSIONER OF EDUCATION

DEPUTY COMMISSIONER
FOR THE PROFESSIONS

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Attachment: BID - City Court Relocation - Bell and Spina

RICHARD K. COLSON, ASSOC. AIA

PROJECT DESIGNER

bell & spina ARCHITECTS

Richard has spent the last 25 years in the profession of architecture and the 20 years prior working in the construction industry. His career path has purposefully sought to integrate both “art” and “science” into the process of designing and constructing buildings. This unique background is an invaluable asset that Richard brings to each project.

Since joining Bell & Spina in 1995, Richard has been involved with a broad range of project types, both public and private. His project involvement has included all aspects of the building process, from conceptual design through construction administration and project delivery. This comprehensive involvement allows Richard to better understand and implement client expectations in all phases of a project.

EDUCATION / CERTIFICATIONS

Bachelor of Architecture, Syracuse University
Associate of Applied Science, Architectural Technology, Onondaga Community College

PROFESSIONAL AFFILIATIONS

American Institute of Architects (AIA) - Associate Member

RELEVANT EXPERIENCE

Onondaga County War Memorial, Balcony and Suite Addition/Renovation Syracuse, NY:

Project Manager for the design of luxury suites overlooking the ice at the Onondaga County historic War Memorial. Also included in the renovation was the adjacent assembly hall, now known as the “All Who Served Room” for Veterans. The remodel included six luxury suites, new finishes, a new bar and warming kitchen, two new upgraded bathrooms and the replacement of mechanical, electrical, plumbing and fire protection systems. Access to the luxury suites is from the “All Who Served Room”.

SRC Inc. “Building 5”, Interior Renovation, North Syracuse, NY:

Rick was the Project Manager/Desinger for the “SRC Building 5” project. The project transformed an existing two-story 45,000 square foot open warehouse into a world-class office/support facility for the R&D company. The project included construction of new offices and associated support spaces at the first floor and mezzanine level and a reconfigured main entry with a new two-story vestibule curtainwall and welcoming reception area. A main kitchen/lounge, several kitchenettes, informal break out spaces and private privacy pods were also part of the overall configuration.

SUNY New Paltz, Bouton Hall, New Paltz, NY:

Bouton Hall was built in 1957 and is one of fourteen residence halls at SUNY New Paltz. The “U” shaped building is four-stories, centrally located within the campus and houses approximately 331 students. The project will configure forty-four (44) new single user bathrooms, primarily within the existing gang bathroom footprints. Rick was the project Manager on the Bouton Hall bathroom renovation.

Syracuse University, Sadler Hall Millwork Prototypes, Syracuse, NY:

Project Manager for the design of built-in millwork prototypes for a potential building-wide millwork replacement. Pre-fabricated solutions for the various new millwork configurations that could ultimately be fabricated and installed efficiently and cost effectively were explored. As part of the design process, Bell & Spina constructed a series of 3D CAD models for each configuration type. This process allowed each of the seven different configurations to be quickly reviewed and subsequently modified by the University if desired.

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RAM-TECH ENGINEERS

PERSONNEL RESUMES

DISCIPLINE:
Electrical

YEARS OF EXPERIENCE
41

YEARS WITH RAM-TECH
32

CERTIFICATIONS & REGISTRATIONS
Professional Engineer - New York (1989)
Professional Engineer - Pennsylvania (1987)
National Council for Engineering Examiners
Certified Construction Specifier

NEW YORKSTATE PE LICENSE NUMBER
066343-2

PROFESSIONAL AFFILIATIONS
National Society of Professional Engineers (NSPE)
Construction Specifications Institute (CSI)
American Institute of Architects - Allied Individual Member

RAVI RAMAN, P.E.
Project Manager

PROFESSIONAL HISTORY

Mr. Raman, RAM-TECH Principal and Co-Founder, has forty-one (41) years of experience as a Project Manager and Electrical / Mechanical Engineer. His expertise includes the management of mechanical, plumbing, fire protection, electrical and cogeneration systems, and has extensive experience designing mechanical, power, lighting and special systems. He has served as the Project Manager, Engineer and Field Representative for a variety of different projects, including hospitals, nursing homes, psychiatric centers, correctional institutions, public schools, universities, governmental buildings and commercial / industrial facilities.

EDUCATION

BS - Engineering, Annamalai University, India (1981)

EXPERIENCE

Town of Sullivan – Sullivan, NY
State Police & Rescue Headquarters Renovation and Addition

New York State Troop D, City of Oneida, NY
Indoor Firing Range

Onondaga County - Countywide
Over 120 projects from 2002 to Present under a Term Contract, including:
Public Safety Building Emergency Generator
Justice Center Replace Fire Alarm Panel
Edward Kochian County Office Building HVAC & FP Design
Sheriff's Headquarters HVAC
Jamesville Correctional Facility CCTV System
Wallie Howard Jr. Center for Forensic Science HVAC Study

Onondaga County John C. Dillon Public Safety Building - Syracuse, NY
911 Room
Standby Generator
HVAC Study

New York State Office of General Services
Department of Corrections, Statewide - A/E Services Term Contract
Utica State Office Building, Utica, NY - Energy Management System
Building 12, Albany, NY - Rehabilitation

Town of Nichols, Nichols, NY
Highway Garage

Onondaga Community College - Syracuse, NY
Service and Maintenance Building

SUNY Upstate Medical Center - Syracuse, NY
Parking Garage West

Skaneateles Central School District - Skaneateles, NY
Combined-Use Garage Service Center

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The University of the State of New York
Education Department
Office of the Professions
REGISTRATION CERTIFICATE
Do not accept a copy of this certificate

License Number: 066343-02 Certificate Number: 1196957

RAMAN RAVI
PO BOX 10
6100 FAIRWAY DR
SYRACUSE NY 13211-0010

is registered to practice in New York State through 02/29/2024 as a(n)
PROFESSIONAL ENGINEER

LICENSEE/REGISTRANT

EXECUTIVE SECRETARY

INTERIM COMMISSIONER OF EDUCATION

DEPUTY COMMISSIONER
FOR THE PROFESSIONS

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RAM-TECH ENGINEERS

PERSONNEL RESUMES

TIMOTHY A. MYERS, P.E., LEED AP
HVAC Department Manager

DISCIPLINE:
Mechanical / HVAC

YEARS OF EXPERIENCE
37

YEARS WITH RAM-TECH
23

CERTIFICATIONS & REGISTRATIONS
Professional Engineer - New York (1988)
LEED Accredited Professional

NEW YORK STATE PE LICENSE NUMBER
065013

PROFESSIONAL AFFILIATIONS
ASHRAE – Professional Member

PROFESSIONAL HISTORY

Mr. Myers has 37 years of experience as a Senior Mechanical Engineer, including 23 years of experience as RAM-TECH's HVAC Department Manager. His expertise includes mechanical system design, project management and construction administration. Mr. Myers' system designs have included boilers, chillers, air and water distribution, water source heat pumps, industrial ventilation, waste heat recovery, process piping, plumbing, fire protection and temperature controls. He has served as the Project Manager and Engineer on a wide range of projects, including hospitals, correctional institutions, public schools, airports, governmental facilities and industrial / commercial buildings.

EDUCATION

BS - Mechanical Engineering, SUNY Buffalo (1983)
AS - Engineering Science, SUNY Alfred (1981)
40 Hour Value-Engineering Workshop

EXPERIENCE

General Services Administration, Various Term Contract Projects, New York State
James M. Hanley Federal Building, HVAC/EMS Repairs; Kenneth Keating Federal Building, Fifth Floor Renovations, Leo O'Brien Federal Building, Lobby Pre-Design Services; Robert McEwan U.S. Customs House, Various Projects' James T. Foley Courthouse, Correct Elevator Power Deficiencies

SUNY Oswego - Oswego, NY
Academic Building Master Plan, New Townhouse Complex (LEED Gold Certified), Master Plan

SUNY Alfred – Alfred, NY
Hinkle Library Study, Athletic Field Rehabilitation

Syracuse City School District - Syracuse, NY
Renovations and Rehabilitation – ELMS, Corcoran, Henninger, Nottingham Schools, 2020 Annual Visual Inspections, 2021 Building Condition Surveys

SUNY Canton – Canton, NY
Athletic Field Rehabilitation

SUNY Oswego - Oswego, NY
New Townhouse Complex, Master Plan

SUNY Morrisville - Morrisville, NY
STUAC and Charlton Buildings, Oneida and Cayuga Hall Renovations

Onondaga Community College - Syracuse, NY
Chiller Replacement, Coulter Library Renovation, Day Care Center, Humidification System, Excel Building Renovation, Applied Technology Center

SUNY Cortland - Cortland - NY
The Glass Tower (LEED Gold Certified), Sperry Learning Resource Center DeGroat Hall Dormitory Ventilation

Buffalo State College, Buffalo, NY
Coyer Field Rehabilitation and Renovation, Moore Hall Central Services

SUNY Upstate Medical University - Syracuse, NY
Computer Warehouse Building, Vertical Expansion - Golisano Children's Hospital

Syracuse University - Syracuse, NY
Modifications and Additions to Link Auditorium, Link Hall 4th Floor Clean Room, South Campus Shop Building Addition

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The University of the State of New York
Education Department
Office of the Professions
REGISTRATION CERTIFICATE
Do not accept a copy of this certificate

License Number: 065013-01 Certificate Number: 1230972

MYERS TIMOTHY ALAN
6100 FAIRWAY DRIVE
SYRACUSE NY 13211-0000

is registered to practice in New York State through 11/30/2023 as a(n)
PROFESSIONAL ENGINEER

LICENSEE/REGISTRANT

EXECUTIVE SECRETARY

INTERIM COMMISSIONER OF EDUCATION

DEPUTY COMMISSIONER
FOR THE PROFESSIONS

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WBE certified company

CHEYENNE J. DASHNAW, PE

Senior Engineer

Cheyenne is a Senior Engineer at Atlantic Testing Laboratories, Limited and is experienced in geotechnical, environmental, construction materials testing, and laboratory testing.

DIVISION

Canton

EXPERIENCE

20 Years

EDUCATION

BS, Civil and Environmental Engineering
Clarkson University
Potsdam, NY

LICENSES

Professional Engineer
NY
#089577-1

CERTIFICATIONS

- NYSDOL Asbestos Building Inspector
- NYSDOL Asbestos Project Designer
- NYSDOL Mold Assessor
- USEPA Lead Supervisor

TRAINING

- Nuclear Density Meter Operator
- OSHA 40-Hour HazWoper
- OSHA 10-Hour General Construction Safety
- Confined Space and Lock Out/Tag Out
- Aerial Lift Training

RESPONSIBILITIES

- Asbestos and hazardous materials surveys and prepares abatement designs and variances.
- Oversight and performance of Phase I, Phase II, and Phase III ESAs. Responsibilities include coordination and execution of the complete project cycle, starting with the proposal preparation and qualifications submittal phase and continuing through project setup and scheduling, execution of field work and training of field technical personnel, interpretation of data and laboratory analyses, and preparation and review of reports.
- Indoor air quality consulting and sampling and analysis.
- Oversight during subsurface investigations and field monitoring of foundation projects, and subsequently preparing subsurface investigation and geotechnical engineering reports.
- Review of Quality Control/Quality Assurance test data.
- Provide seminars that are approved by New York for continuing education units/professional development hours and cover a variety of environmental topics, including Phase I, Phase II, and Phase III ESAs, asbestos, lead, mold, PCB, and hazardous materials assessments.

PROJECT EXPERIENCE

Hazardous Materials Survey, Consulting, & Design

- College Union Ballroom Renovation, SUNY Geneseo
  Geneseo, NY
- Field House Renovation, SUNY Plattsburgh
  Plattsburgh, NY
- Reconstruction & Renovations, City School District of Albany
  Albany, NY
- Capital Project, Newcomb Central School District
  Newcomb, NY
- 2018 Capital Project Phase 3, Peru Central School District
  Peru, NY
- 2016 Capital Project, Morris Central School District
  Morris, NY
- Capital Project, Keene Central School District
  Keene, NY
- Renovation & Addition, River Hospital
  Alexandria Bay, NY
- Radiology Suite Renovations, Samaritan Medical Center
  Watertown, NY
- Greenhouse Replacement, Sunmount DDSO
  Tupper Lake, NY
- Roof Replacements, St. Lawrence Psychiatric Center
  Ogdensburg, NY

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The University of the State of New York
Education Department
Office of the Professions
REGISTRATION CERTIFICATE
Do not accept a copy of this certificate

License Number: 089577-01 Certificate Number: 1949442

DASHNAW CHEYENNE JOHN
3920 STATE HWY 310
NORFOLK NY 13667-0000

is registered to practice in New York State through 10/31/2025 as a(n)
PROFESSIONAL ENGINEER

LICENSEE/REGISTRANT

EXECUTIVE SECRETARY

COMMISSIONER OF EDUCATION

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Attachment: BID - City Court Relocation - Bell and Spina

bell & spina
ARCHITECTS

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SECTION THREE

REPRESENTATIVE PROJECTS

HISTORIC EXPERIENCE (partial list)

bell & spina ARCHITECTS

CORTLAND COUNTY, CORTLAND COUNTY COURTHOUSE RENOVATIONS, CORTLAND, NY: (NR LISTED)
Bell & Spina was retained to prepare a Court Facilities Capital Plan for the four story, 50,000 S.F. building. The project was a phased plan designed to relocate the Department of Motor Vehicles to the old auditorium on the lower level of the Courthouse, along with restoration of the Court Room, District Attorney's Offices and Judges Chambers.

ONONDAGA COUNTY, ONONDAGA COUNTY COURT HOUSE HISTORIC PRESERVATION & ADAPTATION, SYRACUSE, NY: (STATE HISTORIC LISTED)
On the National Register of Historic Places, the Courthouse was built in 1907 in Beaux Arts Style and was in desperate need of restoration. As the roofing consultant to Klepper, Hahn & Hyatt, Bell & Spina completed the replacement of the built-up roof system, copper detailing and repair of the masonry elevator towers.

NEW YORK STATE CAPITAL, ALBANY, NY (NR) The capitol building is part of the Empire State Plaza complex and was completed in 1899 at a cost of $25 million, making it the most expensive government building of its time. Bell & Spina redesigned the courtyard which was leaking into the electrical room below. Also included in the project was the replacement of the exterior copper paneling, flashings, and windows of the one-story Hawk Street Passage which bisects the courtyard. **Cost: $**8.5M **Expected Completion:** 2023

EXECUTIVE MANSION, OFFICE OF REAL PROPERTY MANAGEMENT, ALBANY, NY. (NR) Built in 1856, it has housed New York governors and their families since 1875. Bell & Spina was retained to design the replacement of the existing slate roof, built-in gutters, masonry, flat seam and standing seam copper metal roofing systems.

WELLES HALL, SUNY GENESEO: Welles Hall was constructed in 1932 and its lead-coated copper batten roof system was original to the building. All existing lead-coated copper roofing was removed down to the decks. The roof system was replicated in a terne-coated stainless steel, selected for its appearance, which is similar to the original roofing, and its workability in forming the details necessary to replicate the cupola. **Cost/Size:** $2,029,000 **Completion:** 2020

UTICA ARMORY, UTICA NY (NR) The Armory originally constructed in 1929 and designed by William Haugaard, who utilized a medieval battlement style in the building design and detailing. The occupants of the building reported numerous roof leaks and portions of the ceiling inside had partially collapsed. Our investigation revealed that improper installation of previous roof systems was the leading cause of water infiltration into the building. Bell & Spina completed design and construction administration for a full roof replacement and masonry restoration of the Administration Building on the Utica Armory. **Cost/Size:** $1.7M **Completion:** 2015-2016

SYRACUSE (Headquarters)
215 Wyoming Street Office: 315.488.0377
Syracuse, NY 13204 Fax: 315.487.5947

ROCHESTER
1160-C Pittsford-Victor Rd. Office: 585.200.5038
Pittsford, NY 14534 Fax: 315.487.5947

www.bellandspina.com | info@bellandspina.com

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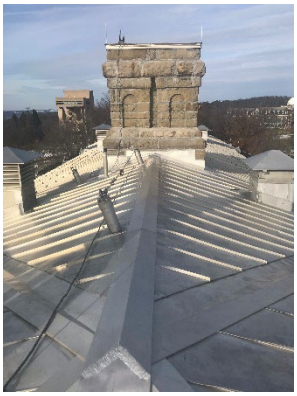
JAMESTOWN ARMORY, JAMESTOWN, NY (NR) The Jamestown Armory built in 1932, it consists of a Tutor Revival-style administration building. NYS Office of General Services retained Bell & Spina to repair several sections of the armory's slate roofs. The scope of the work included abatement of hazardous materials, replacement of slate shingles to match the existing graduated slate shingles, replace copper gutters, downspouts and roof ventilator, extend the electric snow melt system into the new gutters & downspouts, reconfigure the valley flashings, flat seam copper and eave flashings between the dormer and the turret wall and reset the dormer capstones on new zinc-tin coated copper through-wall flashings. **Cost:**$1.1M **Completion:** 2019

Mt. Mc GREGOR CORRECTIONAL FACILITY (NR) The facility was constructed in 1913 as a treatment facility by the Metropolitan Life Insurance Company for the benefit of its employees suffering from tuberculosis. The New York State Department of Corrections assumed control of the facility in 1976. The facility includes one hundred structures on over 1,000 acres. Prior to the prison closing in 2014, Bell & Spina completed the assessment and design for the facade restoration including replacement of windows, stucco repairs, repointing and cleaning of granite, sealant replacement, EIFS repairs, clay tile back-up rebuild, concrete patching and deck waterproofing on nine buildings. **Cost:** $2.95M **Completion:** 2012

ONONDAGA COUNTY WAR MEMORIAL, SYRACUSE, NY (NR) The War Memorial was built between 1949 and 1950 as the first thin-shelled concrete roof structure in the Country. The roof was replaced with a zinc-metal system with an expected life span of 80 to 100 years.
Cost: $4.1M **Completed:** 2011



MORRILL HALL, CORNELL UNIVERSITY, ITHACA, NY. (**SHR/NR)**
Completed in 1868, Morrill Hall is the first of the three "Stone Row" buildings on the quad and the oldest building on the Cornell University Campus. Design included replacement of the slate mansard roof, gutters with heat trace added, low sloped sections with terne coated stainless steel, windows and copper dormers. The building is listed on the National Historic Register and local Ithaca Landmarks. **$**1.6M **Completed** 2018.

MEMORIAL CHAPEL, COLGATE UNIVERSITY:
Built in 1917, Colgate Memorial Chapel is the center piece of the academic quad on campus, used for interfaith church services, convocations, concerts and lectures. Colgate University retained Bell & Spina Architects to replace all the original wood double hung windows. The original single glazed divided lite wood sash windows were drafty in the winter and hot in the summer and most did not fully open or close. The scope of work included replacement of all the original windows with high performance historic wood sash units, insulated glass with simulated divided lites and interior/exterior trim. The exterior casing style was replicated with a custom prefinished aluminum casing to match the original ogee profile. **Cost: $**424,800 **Completed:** 2015

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RAM-TECH ENGINEERS

HISTORICAL PRESERVATION EXPERIENCE

LANDMARK THEATER, Syracuse, NY

RAM-TECH reviewed the mechanical/electrical systems serving the theater to determine their general condition and the work required to accommodate proposed renovations. A new air conditioning system was later designed for the 2,400 seat Landmark Theater. The Landmark Theater is listed on the State and National Registers of Historic Places.

In addition, RAM-TECH Engineers was the MEP sub-consultant to review the present schemes for upgrading the stage house portion of the theatre to provide a venue that could attract and accommodate Broadway scale productions. A scope of work was developed for the stage house, with mechanical and electrical system upgrades and building renovation to follow the architectural concept.

ROBERT C. MCEWAN U.S. CUSTOMS HOUSE RENOVATION, Ogdensburg, NY

GENERAL SUMMARY:

RAM-TECH was the MEP subconsultant responsible for the design of the removal and replacement of all existing HVAC, electrical, plumbing and fire protection systems throughout the 24,000 square foot building at the border of the St. Lawrence and Jefferson County lines in Ogdensburg, NY. The Robert C. McEwan U.S. Custom House was built in 1809 and has the honor of being the oldest United States federal building still in operation. The McEwan Customs House Renovations Project was awarded the 2014 Small Project of the Year for Project Management.

Robert C. McEwan U.S. Customs House

MAHONEY STATE OFFICE BUILDING, Buffalo, NY

RAM-TECH conducted value engineering studies for the adaptive reuse of the Mahoney State Office Building originally constructed in 1925, in downtown Buffalo. Various complete building mechanical and electrical systems were reviewed with respect to maintaining the character of the exterior building façade and the construction of the interior grand lobby areas.

HADLEY RESIDENCE/BUSCH ESTATE, Cooperstown, NY

RAM-TECH was responsible for the mechanical/electrical systems serving the older section of the residence in conjunction with the complete renovation of all interior spaces. The original portion of the Hadley/Busch Residence was built in the late 1800's and preservation of the residence was of major concern and given prime consideration.

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

REPRESENTATIVE PROJECTS

Project:	**Jefferson County Historical Society Reconstruction & Addition**		
Location:	**Watertown, NY**		
Client:	**BCA**	**Contact:**	**Rick Tague**
Summary:	This project consisted of performing Hazardous Materials Survey Services for the roof and designated areas that will be affected by the elevator addition of the building. ATL performed environmental review and assessment services for the project site. Initial services included a Phase I Environmental Transaction Screen (ETS) and limited hazardous materials survey. The hazardous materials survey was performed to identify suspect asbestos-containing materials (ACM), lead-based paint (LBP), and polychlorinated biphenyls (PCB)-containing caulk. ATL subsequently performed subsurface investigation and radon testing services to further assess areas of concern identified during the Phase I ETS. The project did receive state funding and a Site Certification Letter was prepared to qualify environmental conditions at the site after completion of the environmental review and investigations.		

Project:	**NYSOGS NYS Division of Military & Naval Affairs Armories**		
Location:	**New York State**		
Client:	**NYSOGS**	**Contact:**	**Bruce Trobridge, PE**
Summary:	ATL provided hazardous materials consulting services which consisted of surface wipe sampling and lead dust analysis for the purpose of identifying lead-related hazards that may be present within the facilities listed below. In addition, ATL conducted hazardous materials sampling and analysis services that included sampling and analysis of suspect asbestos-containing materials (ACM), lead-containing paint, and polychlorinated biphenyls (PCB)-containing caulk. ATL was also contracted to provide 3rd party project monitoring/oversight services during the lead mitigation projects. This included certified USEPA Lead Inspectors conducting visual and wipe clearance activities, in addition to, certified NYSDOL Asbestos Project Monitors and Air Sampling activities. ATL also provided peer review of the lead-related design documents and provided design support services for the lead mitigation projects.		

- Auburn
- Binghamton
- Conn. Street, Buffalo
- Dunkirk
- Geneseo
- Gloversville
- 5th Ave, Harlem
- Hornell
- Horseheads
- Ithaca
- Jamaica, Queens
- Jamestown
- Kingston
- Leeds
- Lexington Ave, NYC
- Lockport
- Morrisonville
- Masten Ave, Buffalo
- Ogdensburg
- Olean
- Orangeburg
- Peekskill
- Rochester
- Staten Island
- Syracuse
- Troy
- Utica
- Walton
- Whitestone

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

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SECTION FOUR

A/E Fee

Project Tasking Worksheet

BELL & SPINA P.C.
Architects \ Planners
215 Wyoming Street
Syracuse, New York 13204
(315) 488-0377 FAX 487-5947

Project: **City Court Relocation**
Cortland County Courthouse
Cortland, New York
P22-00109

By: DCS
Date: 8/24/2022

TASK | **HOURS**

	Total	Senior Principal	Principal	Project Manager	Project Architect	Architect	Interior Designer	Intern Architect	Technical	Structural Engineer	Field Representative	Construction Coordinator
PHASE 1 - SCHEMATIC DESIGN												
INITIAL SCOPING SITE VISIT	2	2										
SITE VISIT TO CONFIRM CONDITIONS	16			8		8						
GENERATE BASE PLANS / ELEVATIONS	17			1		16						
CODE / REVIEW	4	4										
SCOPE / OPTIONS / BUDGET	16	4		4		8						
PHASING SEQUENCING OPTIONS	0											
COORDINATION WITH MEP / SECURITY	16	8		8								
DESIGN MEETING COUNTY & COURTS	16	8		8								
	0											
	0											
	0											
SUBTOTAL	87	26	0	29	0	32	0	0	0	0	0	0
RATE PER HOUR		$240.00	$210.00	$170.00	$145.00	$125.00	$120.00	$110.00	$95.00	$220.00	$100.00	$ 60.00
SUBTOTAL COST		$ 6,240	$ -	$ 4,930	$ -	$ 4,000	$ -	$ -	$ -	$ -	$ -	$ -

$ 15,170 SUBTOTAL FEE THIS PHASE
$ 5,500 ATL - Hazmat Sampling
$ 6,200 RamTech
$ 2,150 ADMINISTRATION COSTS
$ 29,020 PHASE FEE
$ 29,000 SAY

PHASE 2 - DESIGN DEVELOPMENT												
REFINE DESIGN WITH LARGER SCALE DRAWINGS (PLANS, SECTIONS & ELEVATIONS)	0											
PRELIMINARY SPECIFICATION	0											
GRAPHICS FOR LPB REVIEW	0											
PRELIMINARY CONSTRUCTION BUDGET	0											
GENERATE SUBMITTAL	0											
MEETING WITH CLIENT (1)	0											
SUBTOTAL	0	0	0	0	0	0	0	0	0	0		
RATE PER HOUR		$240.00	$210.00	$170.00	$145.00	$125.00	$120.00	$110.00	$95.00	$220.00	$100.00	$ 60.00
SUBTOTAL COST		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -

$ - SUBTOTAL FEE THIS PHASE
$ - ADMINISTRATION COSTS
$ - PHASE FEE
$ - SAY

PHASE 3 - CONSTRUCTION DOCUMENTS												
PLANS, SECTIONS, ELEVATIONS & DETAILS	160	4		16				140				
SPECIFICATION - FRONT END	20	2		2	16							
SPECIFICATION - TECHNICAL DIVISIONS	42	2		8	32							8
COLOR / MATERIAL SELECTION	26	1		1	8		16					
PREPARE LIST OF SUBMITTALS	0											4
REVIEW MEETING WITH COURTS	8	4		4								
INTERNAL QUALITY CONTROL CHECK	16	4		4				8				
100% DOCUMENT SUBMISSION	1			1								4
GENERATE SUBMITTAL TO PRINTER	1							1				
SUBTOTAL	265	17	0	36	56	0	16	140	0	0	0	12
RATE PER HOUR		$240.00	$210.00	$170.00	$145.00	$125.00	$120.00	$110.00	$95.00	$220.00	$100.00	$ 60.00
SUBTOTAL COST		$ 4,080	$ -	$ 6,120	$ 8,120	$ -	$ 1,920	$ 15,400	$ -	$ -	$ -	$ 720

$ 36,360 SUBTOTAL FEE THIS PHASE
$ 9,900 RamTech
$ 2,909 ADMINISTRATION COSTS
$ 49,169 PHASE FEE
$ 49,200 SAY

PHASE 4 - BIDDING												
PRE-BID CONFERENCE	4			4								
ADDENDA / TELEPHONE QUESTIONS	8			8								
ATTENDANCE AT BID OPENING	0											
Post BID SCOPE VALIDATION MEETINGS	4			4								
CONFORMED SET WITH ADDENDA	0											2
BID ANALYSIS REPORT & RECOMMENDATION FOR AWARD	3	1		2								
SUBTOTAL	19	1	0	18	0	0	0	0	0	0	0	2
RATE PER HOUR		$240.00	$210.00	$170.00	$145.00	$125.00	$120.00	$110.00	$95.00	$220.00	$100.00	$ 60.00
SUBTOTAL COST		$ 240	$ -	$ 3,060	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 120

$ 3,420 SUBTOTAL FEE THIS PHASE
$ 1,800 RamTech
$ 274 ADMINISTRATION COSTS
$ 5,494 PHASE FEE
$ 5,500 SAY

PHASE 5 - CONSTRUCTION ADMINISTRATION												
PRE-CONSTRUCTION MEETING	8			8								
SHOP DRAWING REVIEW AND APPROVAL	16			4				12				8
PROJECT MEETINGS / SITE VISITS (5) ESTIMATED DURATION OF 12 WEEKS	20			20								
MEETING REPORT / FOLLOW UP	10			10								
REVIEW CONTRACTOR'S SCHEDULE OF VALUES	1			1								
REVIEW CONTRACTOR'S PROGRESS SCHEDULE / PAYMENT APPLICATIONS	2			2								2
TELEPHONE QUESTIONS / RFI'S	12			12								
JOB DRAWINGS	16			4				12				
CHANGE ORDERS	5	1		4								
WALK THROUGH & FINAL PUNCH LIST	10	4		6								
FINAL INSPECTION	4			4								
CLOSEOUT DOCUMENTS	3	1		2								1
SUBTOTAL	107	6	0	77	0	0	0	24	0	0	0	11
RATE PER HOUR		$240.00	$210.00	$170.00	$145.00	$125.00	$120.00	$110.00	$95.00	$220.00	$100.00	$ 60.00
SUBTOTAL COST		$ 1,440	$ -	$ 13,090	$ -	$ -	$ -	$ 2,640	$ -	$ -	$ -	$ 660

$ 17,830 SUBTOTAL FEE THIS PHASE
$ 1,426 ADMINISTRATION COSTS
$ 6,200 RamTech
$ 25,456 PHASE FEE
$ 25,450 SAY

$ 109,150 SUBTOTAL FEE
$ 109,150 TOTAL ALL PHASES

Courthouse Renovations City Court) Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize Agreement - Bell & Spina Architects for Cortland County

bell & spina
ARCHITECTS

PROJECT SPECIFICATION

Our Scope of Services will include the following:

- Meetings with representatives of the county, city, and courts to
- Field work to verify existing conditions.
- Develop a scope of work and construction budget of the approved schematic design.
- Generate construction documents for bidding.
- Provide bidding phase services.
- Provide construction administration services.
- Hazardous material report.

Limitations:

- This proposal is based on the preliminary layout provided (Option B).
- Destructive investigations to confirm the existing construction are not included.

PROPOSED SCHEDULE

The anticipated schedule below is based on duration of typical project phases based on the current described scope of work.

Phase:	Duration:
Contract:	4 Weeks
Design:	
Schematic Court Review:	6 Weeks
Construction Documents:	8 Weeks
Bidding / Contract Award:	8 Weeks
Construction:	20 Weeks
Closeout:	6 Weeks
Total	52 weeks

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

SYRACUSE (Headquarters)
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Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

SECTION FIVE

EXHIBIT A – ACKNOWLEDGEMENT AND AGREEMENT TO COMPLY WITH STANDARD CLAUSES FOR NEW YORK STATE CONTRACTS (APPENDIX A)

I hereby acknowledge that I have read, understand and agree to comply with the terms as outlined in Appendix A – Standard Clauses for New York State Contracts. Failure to comply may result in immediate termination of this agreement with potential legal recourse by the County.

Signed: _____ Date: 17 November 2022

Title: President

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

EXHIBIT B – DRUG FREE WORKPLACE

Whenever two or more Bids which are equal with respect to price, quality and service are received by the State or by any political subdivisions for the procurement of commodities or contractual services, a Bid received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. Established procedures for processing the Bids will be followed if none of the tied vendors have a drug free workplace process. In order to have a drug-free workplace program, a business shall:

1) Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2) Inform employees about the dangers of drug abuse in the workplace, the business' policy of maintaining a drug free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3) Give each employee engaged in providing the commodities or contractual services that are under Bid a copy of the statement specified in Subsection (1).
4) In the statement specified in Subsection (1), notify that employees, that, as a condition of working of the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employee of any conviction of, or plea of guilty or nolo contendere to, any violation of any controlled substance law in the United States or any state or Cortland County, for a violation occurring in the workplace no later than five (5) days after such conviction.
5) Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program, if such is available in the employee's community, by any employee who is so convicted.
6) Make a good faith effort to continue to maintain a drug free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies with the above requirements.

Print Name: Douglas K. Arena, AIA Date: 4 November 2022

Signature: Title: President

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

EXHIBIT C - NON COLLUSIVE BIDDING CERTIFICATE REQUIRED BY SECTION 139-D OF THE STATE FINANCE LAW

Section 139D, Statement of Non-Collusion in bids to the State:

By submission of this bid, bidder and each person signing on behalf of bidder certifies, and in the case of joint bid, each party thereto certifies as its own organization, under penalty of perjury, that to the best of his/her knowledge, and belief:

1) The prices of this bid have been arrived at independently, without collusion, consultation, communication, or agreement, for the purposes of restricting competition, as to any matter relating to such prices with any other bidder or with any other competitor;
2) Unless otherwise required by law, the prices which have been quoted in this bid have not been knowingly disclosed by the Bidder and will not knowingly be disclosed by the Bidder prior to opening, directly or indirectly, to any other bidder or to any competitor; and
3) No attempt has been made or will be made by the Bidder to induce any other person, partnership or corporation to submit or not to submit a bid for the purpose of restricting completion.

A Bid shall not be considered for award nor shall any award be made where 1, 2, 3 above have not been complied with; provided however, that if in any case, the bidder(s) cannot make the foregoing certification, the bidder shall so state and shall furnish below a signed statement which sets forth in detail the reasons therefore:

(Affix addendum to this page if space is required for statement.)

Subscribed to me under penalty of perjury under the laws of the State of New York, this 14 day of November, 2022 as the act and deed of said corporation of partnership or sole proprietor.

If Bidders are a Partnership, complete the Following:

Names of Partners or Principals	Legal Residence

If Bidders are a corporation, complete the following:

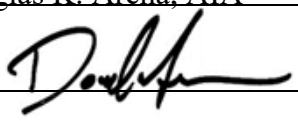
Name	Legal Residence
Douglas K. Arena, AIA, RRC President	4252 E. Genesee St, Syracuse, NY 13214
Neil W. Garry, PE Vice President	147 Langpap Rd, Honeoye, Falls, NY 14472
Secretary	
Treasurer	

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

Identifying Data:

Potential Contractor: Bell & Spina, Architects-Planners, PC
Address: 215 Wyoming Street, Syracuse, NY 13204
Telephone #: 315.488.0377 Title: President
E-Mail Address: darena@bellandspina.com

If applicable, Responsible Corporate Officer
Name: Douglas K. Arena, AIA Title: President

Signature: 

Joint or combined bids by companies or firms must be certified by each participant.

Legal name of person or firm	Legal name of person or firm
Name	Name
Title	Title
Address	Address

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

EXHIBIT D - CONFLICT OF INTEREST DISCLOSURE

Conflict of Interest Disclosure Form

Note: A potential or actual conflict of interest exists when commitments and obligations are likely to be compromised by the nominator(s)'other material interests, or relationships (especially economic), particularly if those interests or commitments are not disclosed.

This Conflict of Interest Form should indicate whether the nominator(s) has an economic interest in, or acts as an officer or a director of, any outside entity whose financial interests would reasonably appear to be affected by the contract. The nominator(s) should also disclose any personal, business, or volunteer affiliations that may give rise to a real or apparent conflict of interest. Relevant Federally and organizationally established regulations and guidelines in financial conflicts must be abided by. Individuals with a conflict of interest should refrain from bidding and/or contracting.

Date: 14 November 2022

Name: Douglas K. Arena, AIA

Position: President

Please describe below any relationships, transactions, positions you hold (volunteer or otherwise), or circumstances that you believe could contribute to a conflict of interest:

x I have no conflict of interest to report.

_____ I have the following conflict of interest to report (please specify other nonprofit and for-profit boards you (and your spouse) sit on, any for-profit businesses for which you or an immediate family member are an officer or director, or a majority shareholder, and the name of your employer and any businesses you or a family member own):

1. _____
2. _____
3. _____

I hereby certify that the information set forth above is true and complete to the best of my knowledge.

Signature:

Company: Bell & Spina, Architects-Planners, PC

Date: 14 November 2022

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

EXHIBIT F – QUALIFICATION QUESTIONNAIRE

All vendors must complete this questionnaire in order to be included in the evaluation of the proposals. The information supplied will enable the County to determine whether or not the vendor has adequate personnel and facilities to properly perform the work.

1. Facility Name and Physical Address: Bell & Spina, Architects-Planners, PC

   215 Wyoming Street, Syracuse, NY 13204

2. Normal Operating Hours:

   a. Weekdays 8 am to 5 pm
   b. Saturdays Closed am to _____ pm
   c. Sundays Closed am to _____ pm
   d. Holidays Closed am to _____ pm

3. Number of Years in Business: 35 yrs
4. Firm History (attach additional pages as necessary): see attached
5. Number of employees on your payroll: 24
6. Do any of your employees have any other special certifications or rating? Yes
   If yes, specify: see attached certification sheet
7. Do you have any special equipment that is available to service the County RFP? Yes
   If yes, specify: Matterport 3D Scan if needed
8. What is the overall size of your facility? _____
9. Do you have a locked, fenced and secured storage area? Yes / No
10. How far in advance must appointments be scheduled? _____
11. In case of emergency, will you accommodate the County with same day services when possible?Yes
12. Shop Distance from 60 Central Avenue, Cortland, NY 35 miles

In submitting this proposal, it is understood that the unrestricted right is reserved by the County in making the award to reject any and all proposals or parts thereof, or to waive any informalities or technicalities in said bids. The undersigned hereby certifies that this bid is genuine, and not a sham or collusive, or made in the interest or in behalf of any person, firm or corporation not herein named; that the undersigned has not directly or indirectly induced or solicited any bidder to refrain from bidding, and that the undersigned has it, in any manner, sought by collusion to secure for himself and advantage over any another bidder.

Neil W. Garry, PE	Neil W. Garry
PRINT NAME	SIGNATURE (Must be 50% Company Owner)
Vice President	15November 2022
TITLE	DATE

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

Form **W-9**
(Rev. November 2017)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

▶ **Go to *www.irs.gov/FormW9* for instructions and the latest information.**

Give Form to the requester. Do not send to the IRS.

Print or type. See **Specific Instructions** on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

Bell & Spina, Architects-Planners, P.C.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC ☐ C Corporation ☑ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ▶

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

215 Wyoming Street

6 City, state, and ZIP code

Syracuse, NY 13204

Requester's name and address (optional)

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN,* later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

			–			–				

or

Employer identification number

1	6	–	1	3	5	1	0	2	2

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here Signature of U.S. person ▶ _____ Date ▶ 12 April 2018

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9.*

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, *later.*

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

CERTIFICATE OF LIABILITY INSURANCE

DATE (M 5/3/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER
Promark Associated Agencies, Inc.
7 Limestone Dr.
Williamsville NY 14221

CONTACT NAME: Jennifer Dissette
PHONE (A/C, No, Ext): (716)633-8401 **FAX (A/C, No):** (716)633-8429
E-MAIL ADDRESS: jdissette@promarkinsurance.com

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : RLI Insurance Company	13056
INSURER B : Navigators Insurance Company	42307
INSURER C : ShelterPoint Life Insurance Company	81434
INSURER D :	
INSURER E :	
INSURER F :	

INSURED
Bell & Spina Architects - Planners, PC.
215 Wyoming Street
Syracuse NY 13204

COVERAGES **CERTIFICATE NUMBER:** CL2232914628 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE X OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: POLICY X PRO-JECT LOC OTHER:	X	Y	PSB0002182	5/1/2022	5/1/2023	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	$ 1,000,0 $ 1,000,0 $ 10,0 $ 1,000,0 $ 2,000,0 $ 2,000,0
A	AUTOMOBILE LIABILITY X ANY AUTO ALL OWNED AUTOS SCHEDULED AUTOS X HIRED AUTOS X NON-OWNED AUTOS	X	Y	PSA0001459	5/1/2022	5/1/2023	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$ 1,000,0 $ $ $
A	X UMBRELLA LIAB X OCCUR EXCESS LIAB CLAIMS-MADE DED RETENTION $	X	Y	PSE0001637	5/1/2022	5/1/2023	EACH OCCURRENCE AGGREGATE	$ 5,000,0 $ 5,000,0
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y/N: N (N/A) (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below			PSW0001922	5/1/2022	5/1/2023	X PER STATUTE OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	$ 1,000,0 $ 1,000,0 $ 1,000,0
B	Professional Liability		Y	CM21DPL062539IV	6/26/2021	6/26/2022	Per Claim / Aggregate	$2M/$
C	Disability			DBL434739	1/1/2022	1/1/2023	NYS DBL	Statut

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
FOR PROPOSAL USE ONLY

CERTIFICATE HOLDER

CANCELLATION
SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE
C Alderson/JWARNE

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Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

bell & spina
ARCHITECTS

LITIGATION

There currently is no litigation or any litigation pending against the firm or any of the Principals of the firm.

Attachment: BID - City Court Relocation - Bell and Spina Architects Submittal AE Renovations Cortland City Courts (11260 : Authorize

SYRACUSE (Headquarters)
215 Wyoming Street Office: 315.488.0377
Syracuse, NY 13204 Fax: 315.487.5947

ROCHESTER
1160-C Pittsford-Victor Rd. Office: 585.200.5038
Pittsford, NY 14534 Fax: 315.487.5947

www.bellandspina.com | info@bellandspina.com

bell & spina
ARCHITECTS

REFERENCES

Onondaga County

Over the years we have been retained by Onondaga a variety of projects most recently renovations to the War Memorial adding boxes to the arena along with the assembly hall renovation, new scoreboard, displays, ribbon LED's and marquees.

Archie Wixson
Deputy Commissioner
Depart. of Facilities Management
600 S. State Street, Syracuse, NY 13202
(315) 435-3451 Office
(315) 484-3328 Mobile
archiewixson@ongov.net

New York State Office of General Services (OGS) (2012 to present)

We have multiple term agreements with OGS with a total 141 assignments to date. The assignments have ranged from major studies, (Oneida Correctional Facility Conversion) to challenging roofing projects at the Empire State Complex (The EGG, and the State Capital Courtyard.)

NY State Office of General Services
Project: Executive Mansion, Rehabilitation
Bevin Collins, R.A. LEED AP
Capitol Architect | Design & Construction | Division of Design
35th Floor, Corning Tower, Empire State Plaza, Albany, NY
(518) 473-2192 Office
Bevin.Collins@ogs.ny.gov

Cornell University (2014 to present)

Cornell recognized Bell & Spina's expertise in building envelope projects and has awarded us with 27 assignments to date. Projects included the historic initial campus building – Morrill Hall – to waterproofing and plaza renovation of Olin Library.

Chris Davenport,
Project Manager
Office of the University Architect | Cornell University
Facilities and Campus Services
607.255.7135 Office
cad67@cornell.edu

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Bell & Spina is a Registered provider of AIA/CES Learning Units

Bell & Spina is a Registered provider of PIE/PDH Credit.

ARCHITECTURE
BUILDING ENCLOSURE
COMMISSIONING
PLANNING

www.bellandspina.com

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Fax: 315.487.5947

www.bellandspina.com | info@bellandspina.com

Cortland County
New York

Cortland County Courthouse Renovations

Cortland County, NY

BERGMANN

OFFICE: 71 STATE STREET
1ST FLOOR, SUITE 104
BINGHAMTON, NY 13901

CONTACT: MARIE CARONE, AIA, LEED AP
GOVERNMENT PRACTICE LEADER

PHONE: 716.465.0643 (M) | 716.804.7009 (O)

EMAIL: MCARONE@BERGMANNPC.COM

WEB: WWW.BERGMANNPC.COM

Photo from Cortland County website

PROPOSAL CONTENTS

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Attachment: BID - City Court Relocation - Bergmann_AE for Cortland County Courthouse (11260 : Authorize Agreement - Bell & Spina

Firm Introduction (BERGMANN – PRIME)

BERGMANN
ARCHITECTS ENGINEERS PLANNERS

Bergmann has joined Colliers Engineering & Design

1,800+

EMPLOYEES
Together, Bergmann & CED employ more than 1,800 people across all areas of expertise.

>95%

REPEAT CLIENTS
More than 95% of our work is from repeat clients.

#213

ENGINEERING NEWS RECORD RANK
We ranked in ENR's Top 500 Design Firm rankings for 2021.

#87

ARCHITECTURAL RECORD RANK
We ranked in Architectural Record's Top 300 rankings for 2021.

#38

BUILDING DESIGN + CONSTRUCTION RANK
We ranked #38 in BD+C's Top 95 Architecture/Engineering Firms nationally in 2021.

Spencerport Fire Department | Spencerport, NY

Irondequoit Department of Public Works | Irondequoit, NY

Four decades of dedicated, client-focused service!

Bergmann joined Colliers Engineering & Design in November 2021, forming a world class architecture, engineering and planning firm with comprehensive capabilities and national reach. Together, our 1,800+ professionals pride themselves on the highest level of integrity, dependability, ethics and quality of work. Our professionals serve as trusted advisors and partners for projects ranging from commercial/retail to municipal/civic, education, transportation, research & manufacturing, water resources and workplaces.

60+ Office Locations

We serve our clients from more than 60 locations nationwide. Visit bergmannpc.com/locations to view our offices.

Our Vision

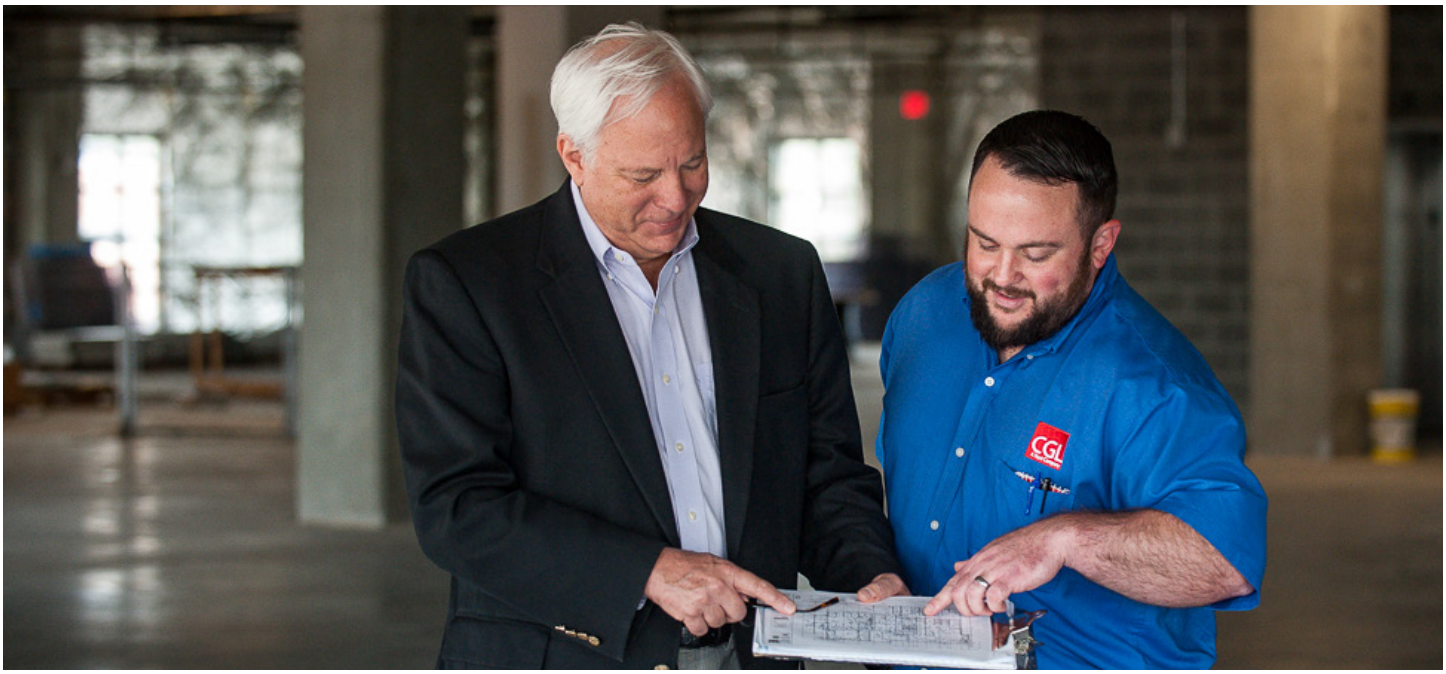
Delivering client success, creating opportunities for our people, and building our future.

Our Values

Our People
Integrity & Ethics
Service
Teamwork & Collaboration
Excellence

Attachment: BID - City Court Relocation - Bergmann_AE for Cortland County Courthouse (11260 : Authorize Agreement - Bell & Spina

Firm Introduction (CGL – SUBCONSULTANT)



Established in 1974, CGL has since grown into the largest, most comprehensive criminal justice consulting firm in the world. Our vertically-integrated 360Justice service platform provides justice owners with:

Significant facility cost savings

Increased facility life

Total understanding of the facility and operations

Speed to market with a single-source solution

Reduced risk and comprehensive plans that work

We are the leading provider of justice facility planning, design, program management and maintenance solutions.

To date, CGL has worked in more than 900 counties and municipalities, all 50 states, and 20 countries. Owners have turned to us to deliver solutions on more than 1,900 projects and we currently manage maintenance for nearly 13 million square feet of justice facilities.

WE ARE INTERNATIONALLY RECOGNIZED EXPERTS IN JUSTICE FACILITIES, SPECIALIZING IN FACILITY PLANNING, DESIGN, MAINTENANCE, AND OPERATIONS.

CGL brings together the top minds in justice planning, design, maintenance, and management. Our team has worked in and alongside criminal justice agencies, dedicating our careers to understanding the complexities and unique nature of the justice system. From operations experts with firsthand experience as wardens, administrators, and directors of justice facilities and systems, to internationally-recognized experts in sustainable justice practices and criminology, we deliver a 360 approach to justice.

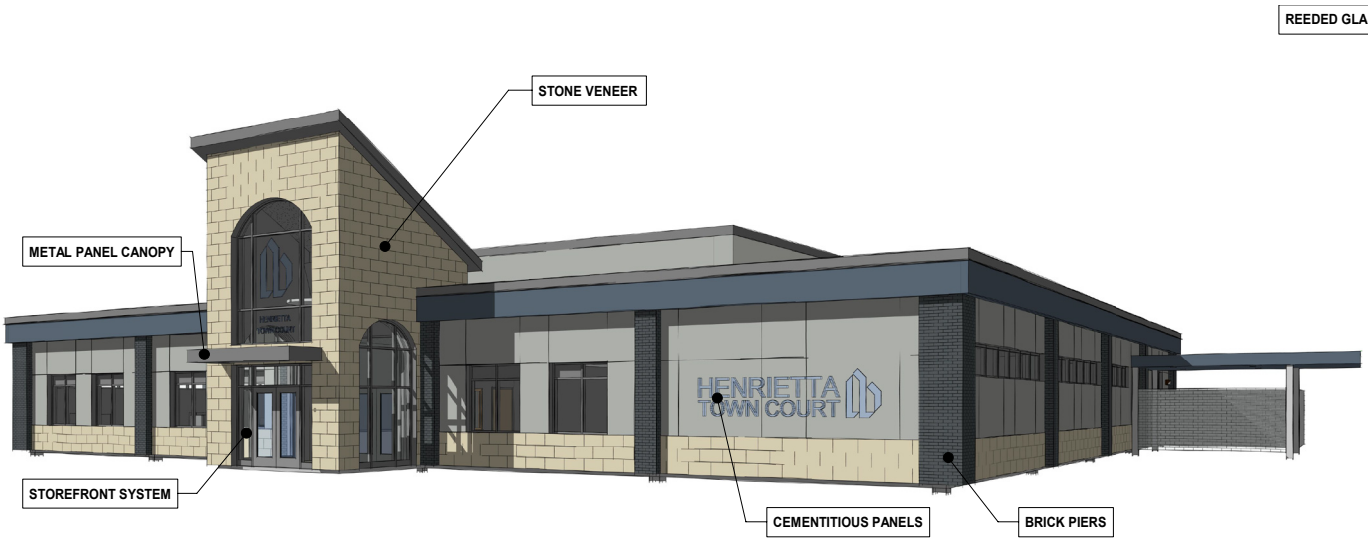
JUSTICE EXPERIENCE

CGL's justice experience includes approximately 300 court projects and planning and programming services for more than 4,000 courtrooms worldwide. CGL's court team is comprised of a deep bench of experts in justice planning and design—with global justice projects.

CGL planners have developed hundreds of needs assessments, facility assessments, programs, and master plans for courts of many jurisdictions. The team is comprised of justice architects and planners to ensure the courts design work informs the planning team in a collaborative process. This ensures sound, efficient and workable programs. The court's team lectures and writes on the topics of courthouse planning and design, have won many awards for work, and are leaders in establishing best practices in justice systems.

Attachment: BID - City Court Relocation - Bergmann_AE for Cortland County Courthouse (11260 : Authorize Agreement - Bell & Spina

Relevant Experience (BERGMANN – PRIME)



NORTHWEST PERSPECTIVE

Henrietta Town Court

Henrietta, NY

PROJECT DESCRIPTION

The existing Henrietta Town Court is located off-campus from the rest of the Town complex. The construction of a new Public Library made a site available at the Town Complex at the location of the former library, which featured an iconic triangular-shaped element housing skylights and mechanical equipment. The shape was used to develop the town logo in the late 1970's. The Town decided to demolish the old library to create a new pad for the Town Court building.

The Bergmann design team determined the program requirements for the new facility, analyzing the operations of the existing Court for successes and deficiencies. The new space of approximately 12,000 sf includes a Main and small Courtroom, judge's chambers for three judges plus future expansion, a jury room, clerks area, records retention, secure area for detained defendants, and attorney-client meeting rooms. Three separate entries are provided for staff, Sheriff, and public. The public entry is at the center of the building from the South and moves occupants through security screening into a lobby serving both courts, a clerks counter, the meeting rooms, and public restrooms. The Sheriff entry includes a small meeting room, men's and women's holding rooms, and a small restroom. Other staff spaces include a break room, mail and trash areas, and restrooms.

The exterior massing and materiality make reference to the previous library and the other Town buildings. The main entry mass will feature a large high-slope roof to pay homage to the iconic triangular element, with a semi-circular window to reference the barrel vaults of Town Hall. The brick piers of the Town Hall are emulated on the Town Court. A screened feature will be provided at the Sheriff's entry to provide privacy and security. Additionally, the walls of the Main Court will extend above the roof of the surrounding spaces to allow for clerestory windows to bring diffused natural light into the Courtroom.

Construction is anticipated to begin in early 2023.

HIGHLIGHTS

- New construction to replace former Town Library location
- Exterior forms and materials pull cues from former building and surrounding Town buildings
- Main and small Courtrooms, Jury room, Judge's chambers, Clerks area, records retention
- Separate entries for Public, Staff, and Sheriff
- Area is approximately 12,000 SF

Attachment: BID - City Court Relocation - Bergmann_AE for Cortland County Courthouse (11260 : Authorize Agreement - Bell & Spina

Relevant Experience (BERGMANN – PRIME)

City of Rochester Public Safety Building

Rochester, NY

PROJECT DESCRIPTION

Bergmann provided full architectural and engineering services for the design of a new Public Safety Building in Downtown Rochester. The building houses the administrative divisions of the City's police and fire departments along with the City's data processing center. The facility is six stories, contains 160,000 square feet of space and was designed to become the focal point of Rochester's Civic Center.

The selected site was very restrictive, literally "wedged" between the City's downtown vehicular arterial and an existing parking structure. Space planning and programming for the building was challenging due to the complex relationships between departmental components and the requirements for a multi-story structure with limited floor plates. During the pre-schematic phase, numerous blocking and stacking alternatives were considered. In the end, the building successfully responded to its site context while internally organizing the complex functions and interactions between the various departments. The building has become one of the most prominent and recognized structures in the city. In accordance with the mayor's wishes, it expresses a progressive and open municipal government.

HIGHLIGHTS

- AIA Rochester Design Award, 2003
- ASHRAE, Region One – First Place for Energy Efficient Design, New Commercial Buildings, 2003
- Six-story Building Design
- Highly Constrained Urban Site
- Public Access/Secured Administrative Space

Attachment: BID - City Court Relocation - Bergmann_AE for Cortland County Courthouse (11260 : Authorize Agreement - Bell & Spina

Relevant Experience (CGL – SUBCONSULTANT)

LOCATION
Stroudsburg, Pennsylvania

SIZE
103,098 GSF
13 Court and Hearing Rooms

COMPLETION DATE
2024 (estimated)

PROJECT COST
$73 Million (estimated)

REFERENCE
Margherita Patti-Worthington
President Judge
Monroe County Courts
610 Monroe Street
Stroudsburg, Pennsylvania 18360
(570) 517-3364

PROJECT DESCRIPTION

The Monroe County Commissioners together with the Judiciary are proceeding with plans to renovate, modernize and build an addition to the County Courthouse. These improvements are a priority for the County and the Court and are the result of over a decade of careful study that consistently demonstrated a need for both expansion and modernization.

The Monroe County Courthouse was built in 1890 and an identically sized addition was built in 1934; both portions were added to the National Register of Historic Places on April 18, 1979. The courthouse was last expanded in 1979 and since then, the courthouse has served our community well.

However, meeting current needs has forced the use of spaces not designed as work areas. With space limitations and an increasingly aged facility, Monroe County Officials have embarked on a project to upgrade the existing courthouse and construct an addition.

CGL is providing a variety of pre-design services that include data collection, visioning, needs assessment, concept design and cost estimating. As the project progresses CGL will see the project through architectural design and all construction administration services.

Attachment: BID - City Court Relocation - Bergmann_AE for Cortland County Courthouse (11260 : Authorize Agreement - Bell & Spina

Relevant Experience (CGL – SUBCONSULTANT)

NEW CASTLE COURTHOUSE RENOVATION

LOCATION
Dover, Delaware

SIZE
3rd Floor Fit-out: 6,670 SF
7th Floor Fit-out: 19,600 SF
8 courtrooms

COMPLETION DATE
2020

PROJECT COST
$10 million

REFERENCE
Mark DeVore
Former Chief of Engineering and Operations
Division of Facilities Management
mark.devore@dtcc.edu

PROJECT DESCRIPTION

In 2016, CGLRicciGreene in association with Tevebaugh Architecture was selected to develop the Feasibility Study for relocating The Justice of the Peace Courts (JP) 10 & 20 into the existing shell spaces on the 7th and 3rd floors in Leonard L. Williams Justice Center. Four shared courtrooms with adjacent chambers and support area are also included in the program to accommodate the growing caseload in Superior, Family and Civil courts. A year later, the team was subsequently retained to provide construction documents, bidding and construction administration services for +/-19,600 sf fit-out of 7th floor and construction documents for the +/-6,670 sf fit-out of the 3rd floor, which will be constructed at a later date. CGLRicciGreene leads the effort for room to room layouts through Schematic Design and responsible for all documents and design in courtrooms and secure area through all design phases. The proposed renovation of the 25,000 sf New Castle Courthouse will improve space adequacy, public experience, operational efficiency and address the increased courtroom needs. The overall layout and finishes are based on the applicable base building standards but take one step further to modernize court operation with new technology and achieve best practice within existing building constraints. As part of courtroom design concepts, the historical millwork form the old Herrmann Courthouse Courtroom 301 has been salvaged and incorporated into Special Proceeding courtroom to reinforce historical and cultural identity.

Attachment: BID - City Court Relocation - Bergmann_AE for Cortland County Courthouse (11260 : Authorize Agreement - Bell & Spina

Organizational Chart

Bergmann will be responsible for the day-to-day management of the Cortland County Courthouse Renovation project, providing a single point of contact that is supported by a team of interdisciplinary experts ready to contribute to the project, as needed.

Cortland County
New York

Steven Kushner *AIA, LEED AP*
*Senior Project Manager**

Marie Carone *AIA, LEED AP*
*Principal-in-Charge**

KEY TEAM MEMBERS

Architecture

Bryan Thompson *Associate AIA*
Architectural Designer II

Trentin Reese *Associate AIA, NCARB*
Architectural Designer II

HVAC, Electrical, & Plumbing Engineering

Troy McClure *PE*
Senior Project Engineer – Mechanical/FP

Brett Eliasz *PE, LEED AP BD+C*
Discipline Leader – Electrical

Courts Planning & Specialty Consulting

Brett Firfer *AICP, LEED AP (CGL)*
*Vice President, Justice Planner**

Project Coordination

Kelly Sullivan
*Senior Designer - Civil Engineering**

*Brief resumes have been provided for key staff members. Full resumes for all team members can be provided on request.

Attachment: BID - City Court Relocation - Bergmann_AE for Cortland County Courthouse (11260 : Authorize Agreement - Bell & Spina

Project Team

Marie Carone, AIA, LEED AP

PRINCIPAL-IN-CHARGE (BERGMANN)

Education: Master of Architecture, SUNY at Buffalo

Baccalaureate of Fine Arts, Radford University

Professional Affiliations:
American Institute of Architects; USGBC National; National Council of Architectural Registration Boards

Marie has over 22 years of experience and joins Bergmann as the Practice Leader for Northeast Buildings Government Practice. She is responsible for a diverse group of architects, planners, landscape architects, and GIS technicians. Over her career, Marie has been involved with a variety of cultural, educational, industrial, and commercial projects. Marie has extensive experience incorporating the diverse interests of stakeholder groups, managing aggressive schedules, and leading staff and consultant teams. Marie works closely with public agencies and governmental clients to solve the unique problems of public works.

Project Experience

- Erie County Department of Public Works | Wendt Beach Mansion and Stables Historic Renovation | Evans, NY | Project Manager/Principal-in-Charge
- Historic Spalding Mill | Lockport, NY | Project Manager/Principal-in-Charge
- DASNY | Social Equity Program Development and Quality Assurance for Design-Build Program | Statewide | Project Manager/Principal-in-Charge
- Erie County Department of Public Works | Building Asset Management Project | Erie County, NY | Project Manager/Principal-in-Charge
- Erie County Department of Public Works | Historic Lincoln Building Redevelopment Project | Buffalo, NY | Project Manager
- Buffalo Urban Development Corporation (BUDC) | 537 East Delavan Avenue & 777 Northland Avenue - National Historic Preservation Act Section 106 Compliance | Buffalo, NY | Project Architect
- Dormitory Authority of the State of New York (DASNY) | Hutchings Psychiatric Center | Rehabilitate Building 8 | Syracuse, NY
- NYSOGS | Industry Secure Center | Rehabilitation of Student Cottages | Rochester, NY | Project Manager

Steve Kushner, AIA, LEED AP

PROJECT MANAGER (BERGMANN)

Education: Master of Architecture, University of Michigan

BS, Architecture, University of Michigan

Professional Affiliations:
American Institute of Architects; National Council of Architectural Registration Boards

Steve has been involved in architecture, design, and construction for over 20 years. Steve has led the design of many different project types with various delivery systems and a wide range of scales. Steve takes a team approach to the design and construction process, working closely with consultant teams, contractors, and owners to develop successful solutions to clients' needs. He takes pride in the quality relationships he has built with those involved in projects he has worked on and is eager for each new challenge.

Project Experience

- Henrietta Town Court | Rochester, NY | Project Manager/Project Architect
- City Hall Addition | Rome, NY | Project Architect
- Historic Clark House | Conditions Assessment and Concept Studies | Penfield, NY | Project Architect
- Erie Canal Harbor Development Corporation (ECHDC) | Terminal B Redevelopment Project | Buffalo, NY | Project Manager
- Yates County Public Safety Building Feasibility Study | Penn Yan, NY | Project Manager/ Project Architect
- Lansing Highway Department Feasibility Study | Lansing, NY | Project Manager
- Chambers Building Conditions Assessment | Rochester, NY | Project Manager
- Liberty Street Bus Transfer Shelter | Rome, NY | Project Architect
- Cayuga County Emergency Services Training Center Feasibility Study | Auburn, NY | Project Manager

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Project Team

Brett Firfer, AICP, LEED AP

COURTS PROGRAMMER (CGL)

Education: MS, Community & Regional Planning, University of Texas at Austin

BS, Architectural Studies, University of Texas at Austin

Professional Affiliations: American Planning Association

Brett has extensive experience planning Federal and state courthouses across the country, provided data analysis and projections, staffing estimates, space programming, pre-design guidelines, conceptual design, and phasing plans. His completed projects range in scale from single buildings to multi-facility master plans with millions of square feet. Brett's strengths include his understanding of justice facility needs and functions, his organizational sensibility, and his broad range of knowledge in justice system operations. Also, as an active member of a Manhattan Community Board 4, Brett has gained valuable experience representing public interests on public and private projects and developments on the West Side of Manhattan.

Project Experience

- Staten Island Courthouse | Staten Island, NY
- Manhattan Courts Master Plan | New York, NY
- Kings County Criminal Courthouse Renovation | Brooklyn, NY
- Kings County Supreme Civil Courthouse Renovation | Brooklyn, NY
- Bronx Family and Criminal Courthouse Renovation | Bronx, NY
- Queens Criminal Courthouse | Queens, NY
- Nassau County Family Court Study | Long Island, NY
- Brooklyn Federal Center | Brooklyn, NY
- Monroe County Courthouse Expansion | Stroudsburg, PA
- New Castle Courthouse Renovation | New Castle, DE
- California Courts Prioritization Study | Statewide, CA
- Elkhart County Courthouse | Elkhart, IN
- Travis County Civil and Family Court | Austin, TX
- Aurora Municipal Campus (Courthouse and Jail) | Aurora, CO

Kelly Sullivan

QUALITY CONTROL ENGINEER – COORDINATION (BERGMANN)

Education: BS, Civil Engineering, Rochester Institute of Technology

Professional Affiliations: Tier Energy Network (TEN), Board Member; ASCE – Ithaca Section Younger Member Group Lead, 2012-Present

Kelly is an experienced project manager and engineer with over 15 years in the execution of multi-disciplinary projects, with a focus on master planning, land development and energy. Kelly utilizes her unique skillset to take projects from concept and planning through construction. Her background and prior experience in project administration, permitting, design and production of engineering documents including contract plans, construction standards and O&M Procedures helps to bring the technical realities of any project into consideration at the early stages of project development.

Project Experience

- Amazon | Wagon Wheel Program | Conklin, NY | Assistant Project Manager
- Gerber | Commercial Property Renovation | Johnson City, NY | Assistant Project Manager
- Town of Vestal | Vestal EMS Facility | Civil/Site Inspector
- Town of Vestal | Vestal Road Multi-Use Feasibility Study | Engineer
- Delaware River Solar, LLC | Permitting and Design for Various Community Solar Projects | Various Locations across New York | Senior Project Manager
- NYSEG | Integrity Management Program | Project Manager
- Fruit and Salad Co. | Bushnell Basin, NY | Junior Engineer
- Churchville-Chili School Campus Improvements | Buffalo Road, Chili, NY | Junior Engineer
- Phase 1 Environmental Site Assessments | East Rochester, NY | Junior Engineer

Attachment: BID - City Court Relocation - Bergmann_AE for Cortland County Courthouse (11260 : Authorize Agreement - Bell & Spina

Scope of Work

PROJECT UNDERSTANDING

Cortland County currently has a municipal complex located in the County seat of the City of Cortland, including County Offices, County Clerk, Supreme and County Court, Public Safety Building with Sheriff Department, County Jail, and Emergency Response offices. The City Court is located across Church Street, co-located with the City Police Station. It is the intent of the County to renovate the County Courthouse to accommodate the City Court program moving into the first floor of the existing four-story building. City Court spaces will include:

- Civil Courtroom with public seating, small jury box, judge's stand, witness stand, and clerk station
- Jury room
- Judge's chambers and secretary office
- Chief clerk office, law clerk, and clerk back office
- Deputy office

The Bergmann Team will provide professional architectural and engineering services required for the successful execution of the Cortland County Courthouse renovation project. Our experienced team will assist the County to determine the best program requirements and layout, organized use of space, opportunities for shared resources between the City and County, and appropriate security separations between the City and County operations, followed by the detailing and documentation to ensure quality project delivery. Our Project Approach is based upon our knowledge of the project and our experience in the design and construction of similar facilities, leveraging the nationwide judicial design experience of CGL companies with the local municipal expertise of Bergmann to provide the County with the best possible project. As presented below, Bergmann has developed a customized approach to the design and construction phase services for the project.

PROJECT APPROACH

1 – Kick-off and Programming Work Session/Schematic Design (SD)

We consider the initial phase of a project to be the most important. During this phase, all key components of the project are realized and measurements for success are established. We recognize the conceptual plan provided in the RFP as the basis for initial discussion to understand the County and City's needs, verify the program, review applicable code implications, and make decisions regarding options presented in the plans. We will also use the initial phase to develop interior concepts for the courtroom spaces, drawing on architectural cues from the adjacent spaces and building Architecture.

Our programming phase will consist of a kick-off meeting with the key stakeholders from the County, City, and courts to determine the primary needs and establish measurable project goals together. We propose for this to be a full day work session led by the experts at CGL Companies to question, confirm, and establish the scope and direction for all decisions related to the project design and delivery. During this session we will consider code implications, discuss all agencies that need to be involved in reviews and approvals, evaluate daily operations, and discuss spatial needs and finish requirements.

Goal #1 – Development of a floor plan for the City Court that will provide for efficient operations and successful use, using the RFP documents as a base. This includes critical items such as: efficient but monitored entry sequence; appropriate order of spaces; adequate separation of disparate facilities while maintaining proper adjacencies; the location of exits and circulation systems; and the consideration of public access and comfort within the various spaces.

Goal #2 – Establish a preferred direction for the interior aesthetic of the Town Court as part of the overall Town complex. This will include entry sequence, massing, and materials.

Following the initial meeting, we will provide a work session summary with meeting minutes, program requirements and adjacency diagrams, and updated schematic plans focused on efficiency in operations and circulation, and security provisions. We will also establish the schedule for deliverables, review, and approvals.

Also in this initial phase, we will collect pertinent building information that will impact the design and construction of the renovation. This includes environmental sampling and testing to determine the presence of hazardous materials that may be encountered during construction, as-builting and tracking of building systems to understand mechanical, electrical, plumbing, and structural systems that will be connected to, and historical research to understand the challenges and opportunities presented within the existing building. We will perform a laser scan of the spaces to be renovated so we have record of the current conditions that will be encountered in the project. This will help us determine a more accurate cost estimate for construction.

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As mentioned, we consider the initial phase as most crucial with respect to the overall success of the project. This phase will lay a solid foundation for the continuation of the project.

Duration: Three to five weeks (to get all testing results)
Meetings: One meeting with the County and City stakeholders – Kick-off work session
Deliverables: Work session meeting minutes with design narrative to capture scope items; Program report with areas, adjacencies, and equipment needs; updated schematic floor plans; clarified design schedule; hazardous materials report

2 – Design Development (DD)

This Phase will focus on progressing the approved Schematic Design and the development of the various building systems. We will conduct regular meetings with the County and City representatives to review progress and solicit feedback on materials, finishes, systems, and plan/interior elevation development. Bergmann will lead the development of this phase, with CGL providing design oversight and review. The scope included in the Design Development phase will include:

- Development of floor plans, wall sections, interior elevations and details as appropriate
- Development of mechanical/electrical system plans and details includes the general configuration of HVAC, plumbing, fire protection, lighting, power, emergency power, fire alarm, security systems, and connections to existing building systems. Strategies for separate services/metering will be determined, if required
- Preliminary specifications to establish basis of design items for facility systems and materials, including cut sheets
- Code review, including coordination with NYS Commission of Correction
- Attendance at regular progress meetings
- An estimate of construction cost

During the Design Development phase, Bergmann will develop the interior design package in conjunction with the other disciplines. In DD, the look and feel of the Town Court will be advanced, including selection of specific materials and finishes, ceiling types and layouts, and user experience in both the public and staff areas. It is essential that the look and feel of the space provides safety and comfort for occupants in the Court facility, promotes well-being for the employees, and represents the values of the City and County of Cortland. We will utilize our 3D modeling of the facility and materials samples to review with the Town. All basis of design selections will be complete by the end of the DD phase, with complete documentation and detail to follow.

Bergmann will lead the HVAC, Plumbing, Fire Protection, Electrical, and Structural Engineering for the project. In Design Development, our Engineering team will attend meetings to coordinate their systems recommendations, then develop the design accordingly. This will include power sizing and distribution, connections for fire protection service, control systems, HVAC distribution, water and gas plumbing systems, and any structural supports.

If the County intends to retain a Construction Manager (CM), we recommend engaging during the Design Development phase in a Design-Assist delivery method. This will allow for better accuracy of cost estimating and success of building systems during construction, and allow for the completion of bid documents to be more efficient.

This phase will conclude with the delivery of the Design Development set, including drawings, outline specifications, cut sheets, and the cost estimate. We will schedule a final meeting with the County and City stakeholders to review comments and obtain approval to advance to the next phase.

Duration: Six to eight weeks, including time for review by the County/City
Meetings: Regular meetings (conference calls or in-person), Final review meeting with the City
Deliverables: DD drawings - building plans, elevations, and sections, systems plans, typical details; preliminary specifications and cut sheets; code report; cost estimate

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3 – Construction Documents (CD) Preparation

We will finalize all drawings and specifications with focus on providing the necessary detail to the court interior and all building systems. Again in this phase, we will conduct regular meetings with the County and City representatives to review progress and solicit continued feedback on the detail development. Bergmann will lead the development of CDs, with CGL providing design review. The scope included in the Construction Document phase will include:

- Development of final plans, elevations, sections, and details
- Development of final mechanical/electrical system plans and details including HVAC, Plumbing, Fire Protection, lighting, power, emergency power, fire alarm, security, access control, A/V, and IT systems
- Creation of a complete Project Manual for bidding, including:
  - » Divisions 0 & 1 specifications (front end) in conjunction with the County, including:
    - Bid forms and information to Bidders
    - NYSDOL prevailing wage rates
    - Funding requirements and forms as required
    - Form of agreement between Owner and Contractor
    - Technical specifications
- Finalize code report
- Attendance at regular progress meetings with the County and City, and one Pre-final Review meeting

During the Construction Documents phase, the engineering design will become more specific, with branch systems coordinated and detailed. All load calculations will be complete for sizing and all components specified. Additionally, specific building systems such as security, access control, audio/visual, and network will be fully designed. Appropriate time will be built into the design schedule to allow for interdisciplinary coordination.

Quality is an essential component for Bergmann. For each phase, we will conduct a thorough Quality Control review with our discipline experts to make sure our documents are well-designed, well-detailed, and well-coordinated. This is vital to our multi-discipline approach.

This phase will conclude with the delivery of the Bid Documents set, including drawings and project manual with front end and technical specifications. We will schedule a pre-final meeting with the County and City stakeholders to review comments before the completion of the bid documents.

Duration: Five to six weeks, including time for review by the County/City
Meetings: Regular progress meetings (conference calls or in-person), Pre-final review meeting
Deliverables: Bid Documents (drawings and Project Manual)

4 – FF&E Services

It is our understanding that selection of furniture will include the NYS Court's 6th Judicial District, and purchase will likely be through State contract. Bergmann will support and assist to select new FF&E and create a bid package for procurement of all FF&E as required. The schedule for this effort will be dependent on the final procurement process.

5 – Bidding & Award Process

Bergmann will support and assist the County (and CM, if applicable) in a competitive bidding process for multiple prime contracts. Our Bidding and Award scope will include:

- Providing bid documents available to bidding contractors
- Providing one (1) set of reproducible bid documents including all addenda to the County prior to construction
- Conducting a pre-bid conference for bidders
- Providing clarifications to bidders' RFI's/issue addenda if required
- Providing bid analysis, bid review, and recommendation of award

Duration: Five weeks
Meetings: Pre-bid conference, Bid opening, Contractor descoping meetings
Deliverables: Responses to RFIs and Addenda if needed

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6 – Construction Services

The Bergmann Team will provide construction administration services during the construction phase, including permitting administration, project field observation, shop drawing review, development of supplemental documentation, and assistance with payment review. Our responsiveness and thorough attention to detail help make the construction phase successful, keeping the project on schedule and budget. Bergmann will host administration of Construction phase documentation using Newforma. Our Construction Services scope will include:

- Submission of permit documents and coordination with all Authorities having jurisdiction to resolve any comments or code-related issues
- Attendance at pre-construction meetings
- Review of shop drawings/submittals and response to RFI's, including generation of revisions to the original construction documents
- Providing on-site observation of the work as required by the County and issuance of Field Reports highlighting work underway and completed, noting items that need attention to be in compliance with Construction Documents
- Review of Project Closeout Documents (contractors' as-builts, O&M Manuals, Warranties)
- Attendance of construction progress meetings (minutes by others)
- Provide on-site punchlist reviews (max. 2) as prepared by Prime Contractors

Duration: Assumed 6 months
Meetings: Pre-construction meetings, progress meetings, site visits, punchlist, and final observation visit
Deliverables: As required

KEY COMPONENTS TO OUR APPROACH

Communication

We recognize the importance of frequent and responsive communication to the success of this project. As noted, Bergmann will hold regular meetings with the County and City stakeholders during the design phases. Decisions made and action items will be promptly reflected in meeting minutes. In addition, we will prepare a contact list for the project that will identify all key staff from our team as well as the County and City. We will take all precautions to prevent miscommunication or a lack of communication.

Team Experience and Collaboration

The Bergmann team is the ideal collaboration to best serve the needs of Cortland County and the City of Cortland. CGL Companies has nearly 50 years of experience and is now the largest, most comprehensive criminal justice consulting firm in the world. Their planning expertise means that all options for the best possible court and support spaces will be evaluated and nothing will be missed or overlooked. Bergmann has award-winning work with similar municipal clients, proficient at working with agencies to determine the most important aspects of a project with sensitivity to the most challenging parts of public work. Our experience includes new construction projects and remodel projects, seeking the highest and best value. We certainly understand the issues and challenges of executing municipal projects by means of state-mandated multiple prime contracts, and specifically regarding Court facilities. We have developed a strategy to maximize both of our talents to ensure success for your project, with CGL leading the planning, programming, and schematic design efforts, as well as reviewing Bergmann's execution of the architectural and engineering design.

Construction Cost Estimate Philosophy

Bergmann coordinates with our cost estimating subconsultants using in-house representatives that are architecturally trained and have years of construction experience to inform the estimate. For us, it is not just about assigning numbers to the design, but valuating and selecting the best possible construction methods for the facility, based upon initial cost vs. life cycle costs, constructability and sequencing, product availability and lead times, and with the understanding of the near and long term needs of Cortland County. The cost estimates will include the following:

- Construction General Conditions
- Construction Costs
- Contractor Overhead & Profit
- Design Contingency & Construction Contingency
- Inflation Contingency (if applicable, based on when construction will occur and any construction phasing)
- Total Cost and Cost per Square Foot

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Sustainable Design Expertise

Bergmann is very experienced with sustainable design principles. Stewardship of the environment is one of our key principles, whether the project is intended be LEED Certified or not.

Buildings are a large consumer of resources and in turn, create substantial impacts on our economy, environment, health and productivity.

In the United States, buildings account for:

- 72% of Electricity Consumption
- 39% of Energy Use
- 40% of Raw Materials Use
- 30% of Waste Output (136 million tons annually)
- 14% of Potable Water Consumption

We understand the importance of employing sustainable design principles in the design, construction and operation of today's facilities and their subsequent economic, social and environmental benefits. Our architects and engineers are in a unique position to influence the built environment and have the expertise to implement a variety of sustainable design features and technologies. Whether to achieve one of the various LEED® certification levels, the EPA's Designed Energy Star® distinction and/or satisfy a client's own established sustainability criteria, the project team will develop a specific sustainable design strategy at the very early stages of the project.

Bergmann currently has over 50 LEED® Accredited Professionals on staff. We use computer modeling programs, such as HAP and Energy Pro to assist in determining the appropriate HVAC and lighting system for each project, based on the client's goals. Our multi-discipline staff allows us to create important synergies between individual building systems. Application of sustainable principals in our design work includes but is not limited to:

- Design of high performing building envelopes
- Lighting and HVAC systems that reduce a facility's total energy usage
- Design of energy efficient HVAC systems, i.e. geothermal heat pump systems, low-temperature hot water systems (radiant floor)
- Design of Net-Zero energy buildings
- Renewable energy sources,. i.e. photovoltaic panels
- Specification of building materials that have a benign impact on the environment throughout their life cycle
- Design of indoor building environments that are healthy and promote occupant satisfaction through interior finish material selection, air quality, lighting design, spatial design and aesthetics
- Commissioning and Enhanced Commissioning of building energy systems
- Design of buildings to meet USGBC® LEED Green Building Rating System™ requirements
- Cost-benefit analyses

We look forward to working closely with the Town of Henrietta to develop a project that incorporates sustainable design practices.

BERGMANN REFERENCES

Town of Henrietta, NY
Stephen L. Schultz, Town Supervisor
475 Calkins Rd
Rochester, NY 14623
585.359.7000
sschultz@henrietta.org

Erie County Department of Public Works
Kristofer Straus, Senior Construction Project Manager
95 Franklin Street, 14th Floor
Buffalo, NY 14202
716.858.7294
Kristofer.Straus@erie.gov

CGL REFERENCES

Delaware Technical Community College
Mark DeVore, Former Chief of Engineering and Operations
mark.devore@dtcc.edu

Monroe County Courts
Margherita Patti-Worthington, President Judge
570.517.3364

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Proposed Fee

Cortland County - Courthouse Renovations

21-Nov-22

Estimate of Probable Construction Value & Costs

		Cost per SF	SF	Percentage	Total Cost
Removal of Hazardous Materials		$ 5.50	5500		$ 30,300
Selective Demolition		$ 5.00	5500		$ 27,500
Construction		$ 130.00	5500		$ 715,000
Furniture, Furnishings, & Equipment		$ 35.00	5500		$ 192,500
Subtotal					**$ 965,300**
Contingency				20%	$ 193,100
Escalation				9%	$ 86,900
Subtotal					**$ 1,245,000**
Professional Fees** - Pre-Design, Concept Dev; Field Investigations	Standard & Additional Services			2.19%	$ 27,240
Professional Fees** - Construction Documents	Standard Services		11.9%	7.89%	$ 98,240
Professional Fees** - Bidding				0.38%	$ 4,760
Professional Fees** - Construction Administration				3.66%	$ 45,620
Expenses	Expenses				$ 5,700
				Total Fee*	**$ 181,560**

*** Fees are based on a projected estimate of probable construciton costs; fees for Constr. Doc.s, Bid., and Constr. Admin. can be renegotiated following Conceptual Design**

**** Complexity Factors include: Judicial design, coordination with NYS Commission of Correction, historic building; unknown existing conditions**

Estimated Professional Services Fees*

	Principal - In-Charge	Sr. Project Manager	Designer II	Digital Design Technician/Scan Operator	Project Coordinator Sr. Project Engineer	HVAC - Sr. Project Engineer	Plumbing/FP - Sr. Project Engineer	Electrical - Sr. Project Engineer	Discipline Leader - Environmental	Environmental Specialist	CADD Technician I	Cost Estimating	Total Hours Per Task	Total
Hourly Billing Rate	$ 230.00	$ 190.00	$ 120.00	$ 140.00	$ 160.00	$ 160.00	$ 160.00	$ 160.00	$ 190.00	$ 90.00	$ 70.00	$ 190.00		
PRE-DESIGN														
Project Management	4												4	$ 920
Building Scan and Field work				42									42	$ 5,880
Testing & Reporting									2	20	12		0	$ 3,020
Meetings (max. 3)	2	4	8										14	$ 2,180
Charette/programming workshop		8												$ 1,520
Floor plan development	2	12	30										44	$ 6,340
Letter Report		6	16										22	$ 3,060
Sub total hours	8	30	54	42					2	20	12		CGL Companies	$ 4,320
DESIGN														
Project Management	12												12	$ 2,760
Field work		8	8			8		8					32	$ 5,040
Design		16	40			8		8	4				76	$ 11,160
Meetings (max. 4)		8	8		2	2		2		2			24	$ 3,620
Drawings		18	196			54	10	54		6	20	12	370	$ 50,040
Specifications		32	16			8	4	8		10			78	$ 12,100
QAQC	8	8			6	4	2	4	4				36	$ 6,680
Submissions (2)		4	8			2	1	2					17	$ 2,520
Sub total hours	20	94	276		8	86	17	86	8	18	20	12	CGL Companies	$ 4,320
BID PHASE SERVICES														
Project Management	1												1	$ 230
Advertisement/Document Services			1										1	$ 120
Response to RFIs		1	6			1	1	1		1			11	$ 1,480
Addenda		1	6			1	1	1		1			11	$ 1,480
Pre-Bid Contractor Walk-Through			1		4								5	$ 760
Bid Evaluation		1											1	$ 190
Sub total hours	1	3	14		4	2	2	2	0	2	0			
CONSTRUCTION ADMINISTRAITON														
Project Management	8												8	$ 1,840
Kick-off, Constr. Progress Mtg.s, Constr. Obser. (14 mtg.s @ 4 hours)		10	26		56	6	1	6					105	$ 16,060
Submittsl/Shops Review		4	48			12	4	12					80	$ 11,000
Response to RFIs			36			8	2	8					54	$ 7,200
Punchlist		4	8			8		8					28	$ 4,280
Punch Lists - walk-through & Reports			8		14	2	1	2					27	$ 4,000
Closeout		4	4										8	$ 1,240
Sub total hours	8	22	130		70	36	8	36						
Total Hours/$$	**37**	**149**	**474**	**42**	**82**	**124**	**27**	**124**	**10**	**40**	**32**	12	**1111**	
Total $$	**8,510**	**28,310**	**56,880**	**5,880**	**13,120**	**19,840**	**4,320**	**19,840**	**$ 1,900.00**	**$ 3,600.00**	**$ 2,240.00**	**2,280**		**$ 167,220**
													CGL Companies	**$ 8,640**
													Estimated Reimbursable Expenses	
													Laboratory Testing Fees	$ 3,700
													Subconsultant Courts Planner - CGL Companies (included above) $ 8,640.00	
													Travel Expenses - Bergmann	$ 1,150
													Travel Expenses - CGL Companies	$ 850
													Total: Expenses	$ 5,700
													Total: Pre-Design Services	$ 27,240
													Total: Design, Bid, Construction Admin. Fee	$ 148,620
													Total Fee	**$ 181,560**

Fee Exclusions and Assumptions: Fee is based on plan presented with RFP; should the planned design significantly increase in scope, an additional fee proposal can be prepared.
The kick-off and design workshop meetings will be conducted in person; some project meetings may be conducted virtually.
Field visits during design are limited to: three (3) by project architect/civil engineer and two (2) by project engineers for each discipline.
Ceiling modifications and lighting design are limited to the extension/modificaitons of the areas affected by new construction; new lighting design throughout is excluded from this fee.
Construction Administration Phase Services include: assumed 26 weeks of construction, the review of submittals, responses to RFIs, Punchlists, construciton observation visits by 1 architect/civil engineering on a bi-weely basis attendance at bi-weekly construction meetings (engineers will attend virtually). Should a clerk-of-the-works be required, an additional fee proposal can be prepared.
Bergmann can provide addional site visits for a per-diem cost of $1,100. This cost assumes eight hours of field and office services for 1 senior staff and is inclusive of travel time.
Fee proposal does not include: construction monitoring for hazardous materials removals during construction.
Should finishes and fixtures for the renovation of the entire first floor be required, an additional fee proposal can be prepared.

MEP Scope
1. Plumbing scope is limited to cooling condensate piping if new HVAC equipment is added.
2. If the building is equipped with a fire protection system, a criteria design will be provided to address the relocation of sprinkler heads to accommodate the new wall changes.
3. Lighting and receptacles will be designed to accommodate the wall changes.
4. Existing HVAC systems will be reviewed, and renovations will be designed to accommodate the new wall changes.
5. Power design to accommodate any new HVAC equipment.
6. If required, construction drawings will include raceway and back boxes for data/IT based on design from the court's IT staff/vendor.

MEP Assumptions
1. Current ventilation air in the building is adequate and meets current code requirements.
2. The existing utilities are adequate and sufficient to accommodate the renovations.
3. Data/IT renovations will be designed and installed by the court's IT staff/vendor.

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Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

▶ **Go to *www.irs.gov/FormW9* for instructions and the latest information.**

Give Form to the requester. Do not send to the IRS.

Print or type. See **Specific Instructions** on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

Bergmann Associates, Architects, Engineers, Landscape Architects & Surveyors D.P.C.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC ☑ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ▶

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

280 East Broad Street, Suite 200

Requester's name and address (optional)

6 City, state, and ZIP code

Rochester, NY 14604

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN,* later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

			–			–				

or

Employer identification number

2	5	–	1	4	0	7	7	1	8

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here Signature of U.S. person ▶ [signature] Date ▶ 09/08/2022

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9.*

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, *later.*

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By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),

2. Certify that you are not subject to backup withholding, or

3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and

4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting,* later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515, Withholding of Tax on Nonresident Aliens and Foreign Entities).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.

2. The treaty article addressing the income.

3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.

4. The type and amount of income that qualifies for the exemption from tax.

5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester,

2. You do not certify your TIN when required (see the instructions for Part II for details),

3. The IRS tells the requester that you furnished an incorrect TIN,

4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or

5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code,* later, and the separate Instructions for the Requester of Form W-9 for more information.

Also see *Special rules for partnerships,* earlier.

What is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code,* later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of $50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a $500 penalty.

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Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

a. **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note: ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C corporation, or S corporation.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

d. **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

Line 3

Check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

IF the entity/person on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation
• Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes.	Individual/sole proprietor or single-member LLC
• LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes.	Limited liability company and enter the appropriate tax classification. (P= Partnership; C= C corporation; or S= S corporation)
• Partnership	Partnership
• Trust/estate	Trust/estate

Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)

2—The United States or any of its agencies or instrumentalities

3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

4—A foreign government or any of its political subdivisions, agencies, or instrumentalities

5—A corporation

6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession

7—A futures commission merchant registered with the Commodity Futures Trading Commission

8—A real estate investment trust

9—An entity registered at all times during the tax year under the Investment Company Act of 1940

10—A common trust fund operated by a bank under section 584(a)

11—A financial institution

12—A middleman known in the investment community as a nominee or custodian

13—A trust exempt from tax under section 664 or described in section 4947

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The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
Interest and dividend payments	All exempt payees except for 7
Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 4
Payments over $600 required to be reported and direct sales over $5,000[1]	Generally, exempt payees 1 through 5[2]
Payments made in settlement of payment card or third party network transactions	Exempt payees 1 through 4

[1] See Form 1099-MISC, Miscellaneous Income, and its instructions.

[2] However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)

B—The United States or any of its agencies or instrumentalities

C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state

G—A real estate investment trust

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940

I—A common trust fund as defined in section 584(a)

J—A bank as defined in section 581

K—A broker

L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester,* later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at *www.SSA.gov*. You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at *www.irs.gov/Businesses* and clicking on Employer Identification Number (EIN) under Starting a Business. Go to *www.irs.gov/Forms* to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to *www.irs.gov/OrderForms* to place an order and have Form W-7 and/or SS-4 mailed to you within 10 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code,* earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

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1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account[1]
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor[2]
5. a. The usual revocable savings trust (grantor is also trustee) b. So-called trust account that is not a legal or valid trust under state law	The grantor-trustee[1] The actual owner[1]
6. Sole proprietorship or disregarded entity owned by an individual	The owner[3]
7. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))	The grantor*
For this type of account:	**Give name and EIN of:**
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity[4]
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(i)(B))	The trust

[1] List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

[2] Circle the minor's name and furnish the minor's SSN.

[3] You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

[4] List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships,* earlier.

***Note:** The grantor also must provide a Form W-9 to trustee of trust.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

Protect yourself from suspicious emails or phishing schemes. Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

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The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to *phishing@irs.gov*. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at *spam@uce.gov* or report them at *www.ftc.gov/complaint*. You can contact the FTC at *www.ftc.gov/idtheft* or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see *www.IdentityTheft.gov* and Pub. 5027.

Visit *www.irs.gov/IdentityTheft* to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.

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Office of the Professions

Verification Searches

The information furnished at this web site is from the Office of Professions' official database and is updated daily, Monday through Friday. The Office of Professions considers this information to be a secure, primary source for license verification.

Business Entity Information *

11/16/2022

Name : BERGMANN ASSOCIATES ARCHITECTS ENGINEERS LANDSCAPE ARCHITECTS & SURVEYORS DPC
Street Address :
280 EAST BROAD ST
2ND FLOOR
ROCHESTER, NY 146040000

Business Entity : Design Professional Service Corporation
PSC # : 098669
Initial Filing Date : 08/08/12
Current through : 07/31/24

Certificate of Authorization to provide Land Surveying Services in New York State :
YES CERT# 0018900 EXPIRES 07/24

Certificate of Authorization to provide Professional Engineering Services in New York State :
YES CERT# 0019019 EXPIRES 07/24

Officers, Directors, Shareholders : Click on license number link to the left of professional's name for detailed information.
072957 GIOVENCO PIETRO VINCENT -
073576 JOHNSON GREGORY LAWRENCE -
088637 KEVGAS GEORGE JOHN -
091146 HEDDEN JEREMY ALLEN -
091501 CHELOTTI RICHARD WILBERT -

* Use of this online verification service signifies that you have read and agree to the terms and conditions of use. See HELP glossary for further explanations of terms used on this page.

- Use your browser's back key to return to establishment list.
- You may search to see if there has been recent disciplinary action against this registered establishment.

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EXHIBIT A – ACKNOWLEDGEMENT AND AGREEMENT TO COMPLY WITH STANDARD CLAUSES FOR NEW YORK STATE CONTRACTS (APPENDIX A)

I hereby acknowledge that I have read, understand and agree to comply with the terms as outlined in Appendix A – Standard Clauses for New York State Contracts. Failure to comply may result in immediate termination of this agreement with potential legal recourse by the County.

Signed: _____ Date: 11/21/2022

Title: Vice President, Northeast Buildings

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EXHIBIT B – DRUG FREE WORKPLACE

Whenever two or more Bids which are equal with respect to price, quality and service are received by the State or by any political subdivisions for the procurement of commodities or contractual services, a Bid received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. Established procedures for processing the Bids will be followed if none of the tied vendors have a drug free workplace process. In order to have a drug-free workplace program, a business shall:

1) Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2) Inform employees about the dangers of drug abuse in the workplace, the business' policy of maintaining a drug free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3) Give each employee engaged in providing the commodities or contractual services that are under Bid a copy of the statement specified in Subsection (1).
4) In the statement specified in Subsection (1), notify that employees, that, as a condition of working of the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employee of any conviction of, or plea of guilty or nolo contendere to, any violation of any controlled substance law in the United States or any state or Cortland County, for a violation occurring in the workplace no later than five (5) days after such conviction.
5) Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program, if such is available in the employee's community, by any employee who is so convicted.
6) Make a good faith effort to continue to maintain a drug free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies with the above requirements.

Print Name: Kimberly Baptiste, AICP Date: 11/21/2022

Signature: Kimberly Baptiste Title: Vice President, Northeast Buildings

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EXHIBIT C - NON COLLUSIVE BIDDING CERTIFICATE REQUIRED BY SECTION 139-D OF THE STATE FINANCE LAW

Section 139D, Statement of Non-Collusion in bids to the State:

By submission of this bid, bidder and each person signing on behalf of bidder certifies, and in the case of joint bid, each party thereto certifies as its own organization, under penalty of perjury, that to the best of his/her knowledge, and belief:

1) The prices of this bid have been arrived at independently, without collusion, consultation, communication, or agreement, for the purposes of restricting competition, as to any matter relating to such prices with any other bidder or with any other competitor;
2) Unless otherwise required by law, the prices which have been quoted in this bid have not been knowingly disclosed by the Bidder and will not knowingly be disclosed by the Bidder prior to opening, directly or indirectly, to any other bidder or to any competitor; and
3) No attempt has been made or will be made by the Bidder to induce any other person, partnership or corporation to submit or not to submit a bid for the purpose of restricting completion.

A Bid shall not be considered for award nor shall any award be made where 1, 2, 3 above have not been complied with; provided however, that if in any case, the bidder(s) cannot make the foregoing certification, the bidder shall so state and shall furnish below a signed statement which sets forth in detail the reasons therefore:

(Affix addendum to this page if space is required for statement.)

Subscribed to me under penalty of perjury under the laws of the State of New York, this 21 day of November, 2022 as the act and deed of said corporation of partnership or sole proprietor.

Dawn J Kowalik

DAWN J KOWALIK
NOTARY PUBLIC, STATE OF NEW YORK
Registration No. 01KO6035252
Qualified in New York County
Commission Expires December 27, 2025

If Bidders are a Partnership, complete the Following:

Names of Partners or Principals	Legal Residence

If Bidders are a corporation, complete the following:

Name	Legal Residence
Joseph Dopico, PE	20 Fabrizio Drive; Newburgh, NY 12550
President Kevin Haney, PE	1507 Bel Aire Ct W; Pt. Pleasant, NJ 08742
Vice President Leonardo Ponzio, PLS	34 Shield Road; Millstone Township, NJ 08535
Secretary Leonardo Ponzio, PLS	34 Shield Road; Millstone Township, NJ 08535
Treasurer	

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Identifying Data:

Potential Contractor: Bergmann Associates, Architects, Engineers, Landscape Architects & Surveyors, D.P.C.
Address: HQ: 280 East Broad Street, Suite 200; Rochester, NY 14604
Branch Office: 71 State Street, 1st Floor, Suite 104; Binghamton, NY 13901
Telephone #: 585.498.7770 Title: Vice President, Northeast Buildings
E-Mail Address: kbaptiste@bergmannpc.com

If applicable, Responsible Corporate Officer
Name: Kimberly Baptiste, AICP Title: Vice President, Northeast Buildings

Signature: Kimberly Baptiste

Joint or combined bids by companies or firms must be certified by each participant.

Legal name of person or firm CGL Companies Architects, PLLC (subconsultant)	Legal name of person or firm
Name Brett Firfer	Name
Title Vice President	Title
Address 1330 Ave. of the Americas 28th Floor; New York, NY 10019	Address

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EXHIBIT D - CONFLICT OF INTEREST DISCLOSURE

Conflict of Interest Disclosure Form

Note: A potential or actual conflict of interest exists when commitments and obligations are likely to be compromised by the nominator(s)'other material interests, or relationships (especially economic), particularly if those interests or commitments are not disclosed.

This Conflict of Interest Form should indicate whether the nominator(s) has an economic interest in, or acts as an officer or a director of, any outside entity whose financial interests would reasonably appear to be affected by the contract. The nominator(s) should also disclose any personal, business, or volunteer affiliations that may give rise to a real or apparent conflict of interest. Relevant Federally and organizationally established regulations and guidelines in financial conflicts must be abided by. Individuals with a conflict of interest should refrain from bidding and/or contracting.

Date: 11/21/2022

Name: Kimberly Baptiste, AICP

Position: Vice President, Northeast Buildings

Please describe below any relationships, transactions, positions you hold (volunteer or otherwise), or circumstances that you believe could contribute to a conflict of interest:

X I have no conflict of interest to report.

_____ I have the following conflict of interest to report (please specify other nonprofit and for-profit boards you (and your spouse) sit on, any for-profit businesses for which you or an immediate family member are an officer or director, or a majority shareholder, and the name of your employer and any businesses you or a family member own):

1. _____
2. _____
3. _____

I hereby certify that the information set forth above is true and complete to the best of my knowledge.

Signature:

Company: Bergmann Associates, Architects, Engineers, Landscape Architects & Surveyors, D.P.C.

Date: 11/21/2022

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EXHIBIT E

PRIVACY AND SECURITY
(HIPAA)

The purpose of this clause is to set forth the requirements for privacy and security of protected health information ("PHI") mandated by 45 CFR Part 164 as they apply to the services provided by CONTRACTOR on behalf of COUNTY.

(A) CONTRACTOR understands the importance of the privacy of a patient's PHI, and agrees to protect that right to the extent necessary under this Agreement and under current federal, state, and local regulations and laws. All PHI will be handled in a private and/or confidential manner. For purposes of this Agreement, PHI is any data or other information as defined by the Department of Health and Human Services in the Code of Federal Regulations, 45 CFR §164.501.

(B) Further, CONTRACTOR understands that County's patients are intended third-party beneficiaries of this Agreement, and have all the rights and privileges of any third-party beneficiary under current law.

(C) Uses and disclosures of PHI that are permitted are those necessary in order for CONTRACTOR to:

1. Properly manage and administer its functions.
2. Meet its legal responsibilities.
3. Provide data aggregation services relating to the health care operations of the COUNTY.
4. Make those disclosures required by law such as in situations of abuse, neglect, or domestic violence. The uses and disclosures permitted are limited to the PHI necessary to meet the requirements of the law that compels the use or disclosure.
5. Make disclosures in response to a judicial or administrative proceeding through a lawful process such as a subpoena or discovery request.

(D) The uses and disclosures of PHI that are required are those disclosures necessary:

1. For patients to review their PHI.
2. To provide an accounting of disclosures in accordance with 45 CFR §164.528.
3. To allow the Secretary of Health and Human Services to determine County's compliance with 45 CFR §164.504.

(E) CONTRACTOR shall make the following assurances to COUNTY:

1. CONTRACTOR agrees that it shall not use or disclose any patient's PHI for any purpose not expressly stated in this Agreement. Further, CONTRACTOR shall not use or disclose PHI in any manner or context prohibited by the Health Insurance Portability and Accountability Act of 1996 ("HIPAA") and subsequent federal,

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state, and local stated in this Agreement, it shall immediately cease the unauthorized use or disclosure, and shall notify COUNTY in writing of such use or disclosure. CONTRACTOR agrees to mitigate, to the extent practicable, any harmful effect known to it of a use or disclosure of PHI not allowed under this Agreement.

2. CONTRACTOR further agrees that any sub-contractors or other persons or entities not directly employed by CONTRACTOR who use or disclose PHI obtained from COUNTY, shall abide by terms of this clause of this Agreement. Any sub-contractor or other person or entity not directly employed by CONTRACTOR that has used or disclosed PHI without proper authorization (as defined in HIPAA and subsequent federal, state, and local regulations) shall be considered to have acted as an agent of CONTRACTOR, and have violated the terms of this Agreement. COUNTY may consider this use or disclosure a material breach of this Agreement.
3. By signing this Agreement, CONTRACTOR is assuring COUNTY it has met the minimum safeguards necessary to protect unauthorized use or disclosure of PHI to any person or entity not party to this Agreement. Such safeguards shall include the security safeguards outlined by the 1996 Health Insurance Portability and Accountability Act and subsequent federal regulation, including: physical access to PHI, technical access to PHI, and administrative policies and procedures addressing security of PHI.
4. Provider shall report to COUNTY any instance or circumstance in which PHI has been used or disclosed by an unauthorized person or entity, including accidental disclosure by CONTRACTOR. CONTRACTOR shall notify COUNTY in writing of any steps or procedural changes made to address the unauthorized use or disclosure.
5. Should COUNTY find PHI used or disclosed to CONTRACTOR to be inaccurate or incomplete, CONTRACTOR shall incorporate any amendments or corrections to the PHI at COUNTY's request.
6. CONTRACTOR will make PHI available to the individual who is the subject of the PHI for amendment. Such requests by the individual for their PHI from CONTRACTOR will be made through County. CONTRACTOR will incorporate any amendments to PHI that have been made by COUNTY by virtue of the individual's request for amendment.
7. CONTRACTOR will provide a timely accounting to the individual or to COUNTY, if requested by either, of the disclosures of an individual's PHI.
8. Should CONTRACTOR make any material alterations to the PHI while the PHI is in its possession, CONTRACTOR shall notify COUNTY of such alterations so that COUNTY may inform the patient who is the subject of the PH
9. At the termination of this Agreement, CONTRACTOR shall return or destroy to the satisfaction of COUNTY any PHI held or maintained by CONTRACTOR and retain no copies of such information. If COUNTY and CONTRACTOR mutually agree that returning or destroying the PHI is not feasible or permitted under law, the PHI will remain

protected after this agreement ends for as long as CONTRACTOR maintains the information. Further uses or disclosures of the PHI will be limited to those purposes that make the return or destruction infeasible.

(F) If COUNTY determines CONTRACTOR has violated any of the above assurances, covenants or terms, the CONTRACTOR has committed a material breach of this Agreement. COUNTY may then provide CONTRACTOR with an opportunity to cure the breach or may terminate this Agreement and may report the violations to the Department of Health and Human Services ("HHS") or other federal or state entity for possible prosecution or sanctions.

(G) Both parties to this agreement agree that they will protect the integrity and confidentiality of any PHI being shared electronically.

(H) CONTRACTOR hereby gives COUNTY and the Department of Health and Human Services (or an agent acting on behalf of HHS) the express right to inspect any and all internal practices, books, and records relating to the use or disclosure of PHI by CONTRACTOR. If HHS suspects an unauthorized use or disclosure of PHI by CONTRACTOR, HHS is authorized to pursue an investigation into CONTRACTOR's activities for the purposes of determining whether an unauthorized use or disclosure of PHI has taken place.

(I) CONTRACTOR may have policies and procedures relating to privacy and security in place prior to the commencement of this Agreement. If, after reasonable investigation, COUNTY concludes CONTRACTOR's policies and procedures to be "adequate" protection of a patient's privacy rights relating to PHI, CONTRATOR may elect to continue to use its own policies and procedures. The term "adequate" in this clause means CONTRACTOR's policies and procedures meet the minimum privacy and security standards as set forth in COUNTY's privacy and security policies and procedures.

(J) COUNTY, through the appropriate Department will:

1. provide CONTRACTOR with its Privacy Notice;
2. provide CONTRACTOR with any changes in, or revocation of, permission by a patient to use or disclose PHI, if such changes affect CONTRACTOR's permitted or required uses or disclosures; and
3. notify CONTRACTOR of any restriction to the use or disclosure of PHI to which the COUNTY has agreed.

(K) Implement administrative, physical, and technical safeguards that reasonably and appropriately protect the confidentiality, integrity, and availability of the electronic protected health information (ePHI) that it creates, receives, maintains, or transmits on behalf of Cortland County.

(L) Ensure that any agent, including a subcontractor, to whom Contractor provides ePHI agrees to implement reasonable and appropriate safeguards to protect this information.

(M) Report to Security Officer of Cortland County any security incidents of which it

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becomes aware. (A security incident is defined as the attempted or successful unauthorized access, use, disclosure, modification, or destruction of information or interference with system operations in an information system.)

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EXHIBIT F – QUALIFICATION QUESTIONNAIRE

All vendors must complete this questionnaire in order to be included in the evaluation of the proposals. The information supplied will enable the County to determine whether or not the vendor has adequate personnel and facilities to properly perform the work.

1. Facility Name and Physical Address: Bergmann Associates, Architects, Engineers, Landscape Architects & Surveyors, D.P.C.

   71 State Street, 1st Floor, Suite 104; Binghamton, NY 13901

2. Normal Operating Hours:

   a. Weekdays 9 am to 5 pm
   b. Saturdays _____ am to _____ pm
   c. Sundays _____ am to _____ pm
   d. Holidays _____ am to _____ pm

3. Number of Years in Business: 42
4. Firm History (attach additional pages as necessary): See proposal.
5. Number of employees on your payroll: 552
6. Do any of your employees have any other special certifications or rating? (Yes) / No
   If yes, specify: Please see answer on next page.
7. Do you have any special equipment that is available to service the County RFP? (Yes) / No
   If yes, specify: Please see answer on next page.
8. What is the overall size of your facility? Please see answer on next page.
9. Do you have a locked, fenced and secured storage area? (Yes) / No Please see answer on next page.
10. How far in advance must appointments be scheduled? Please see answer on next page.
11. In case of emergency, will you accommodate the County with same day services when possible?
    (Yes) / No
12. Shop Distance from 60 Central Avenue, Cortland, NY 45 min (42 mi)

In submitting this proposal, it is understood that the unrestricted right is reserved by the County in making the award to reject any and all proposals or parts thereof, or to waive any informalities or technicalities in said bids. The undersigned hereby certifies that this bid is genuine, and not a sham or collusive, or made in the interest or in behalf of any person, firm or corporation not herein named; that the undersigned has not directly or indirectly induced or solicited any bidder to refrain from bidding, and that the undersigned has it, in any manner, sought by collusion to secure for himself and advantage over ~~any~~ another bidder.

Kimberly Baptiste, AICP	K M Baptiste
PRINT NAME	SIGNATURE (Must be 50% Company Owner)
Vice President, Northeast Buildings	11/21/2022
TITLE	DATE

Question 6 – RA, AIA, PE, LEED AP, PMP, CSI, NCARB, AICP, CCS, CCCA (Registered Architect, American Institute of Architects, Professional Engineer, LEED Accredited Professional, Project Management Professional, Construction Specifications Institute, National Council of Architectural Registration Boards, American Institute of Certified Planners, Certified Construction Specifier, Certified Construction Contract Administrator).

Question 7 – Yes, Bergmann owns the equipment, and has the in-house capability to provide the following services that would be useful for a complex interior renovation project:

- Laser scanning equipment to accurately and quickly capture detailed building information. By sending out millions of lasers and geographically recording their points in space a 3d model is created with sub-centimeter accuracy.
- Virtual reality visualizations of interior environments. Can be used anywhere to step into our design models and experience them before being constructed.
- Augmented Reality allows you to overlay 3d/modeled objects with the real world environment. This can be used to visualize the designs on-site before being constructed.

Question 8 – We have multiple offices nationally. Regionally, we have office locations in Rochester (56,000 SF), Albany (15,000 SF) and Binghamton (1500 SF).

Question 9 – Yes, we have secure off-site storage for sensitive documents and information. Additionally, we have a very robust IT security protocol and active software.

Question 10 – We can typically respond to requests for meetings within one week. We can be available for emergency meetings or site visits if and when needed.

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PROPOSAL FOR

ARCHITECTURAL/ENGINEERING SERVICES

November 21, 2022 | P29322

PREPARED FOR

CORTLAND COUNTY

PREPARED BY

Keystone Associates Architects, Engineers
and Surveyors, LLC
58 Exchange Street, Binghamton, NY 13901
Tel: (607) 722-1100 | Email: info@keyscomp.com

KEYSTONE ASSOCIATES
ARCHITECTS | ENGINEERS | SURVEYORS

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

KEYSTONE ASSOCIATES
ARCHITECTS | ENGINEERS | SURVEYORS

Kenneth D. Ellsworth, P.E.
Managing Member

Paul L. Bedford, AIA
Architect

Rodney L. Carey, L.S.
Land Surveyor

Kordian W. Wichtowski, R.A.
Architect

November 21, 2022

Ms. Savannah Hempstead
Clerk
Cortland County Legislature
60 Central Avenue, Suite 306
Cortland, NY 13045

Re: Proposal for Architectural/Engineering
Cortland County Courthouse Renovations

Dear Ms. Hempstead:

Keystone Associates Architects, Engineers and Surveyors, LLC, appreciates the opportunity to submit this proposal to provide professional services for the above referenced project.

As detailed in our proposal, we have extensive experience in the rehabilitation of historic buildings. We have worked closely with the First Ward Action Council and New York State Office of Parks, Recreation and Historical Preservation Office to assure compliance with Department of Interior Standards and the State Historic Preservation Office (SHPO) here in Binghamton on many historic buildings for the last 20 years. This speaks volumes of the trust the client has in our capabilities.

In addition to our in-house staff, we have included the following firms on our team:
- RAM-TECH Engineers, P.C. (MBE) - MEP Engineering
- Johnson-Schmidt & Associates, Architects (WBE) - Historic Preservation Consultant
- Keystone Environmental Services - Asbestos Testing

Our team will work closely with your representatives to prioritize repairs and to define strategies to comprehensively and efficiently achieve these objectives.

We appreciate the opportunity to submit our proposal for this project and look forward to the opportunity to work with Cortland County.

Respectfully,

Keystone Associates
Architects, Engineers and Surveyors, LLC

Paul L. Bedford, AIA
Member

Enclosure

Main Office
58 Exchange Street
Binghamton, New York 13901
Phone: 607.722.1100
Fax: 607.722.2515

Branch Office
165 South Main Street, Suite 6
Cortland, New York 13045
Phone: 607.753.8015

Branch Office
30 North Street, 2nd Floor
Monticello, New York 12701

E-mail: info@keyscomp.com
www.keyscomp.com

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

QUALIFICATION REQUIREMENTS

1. Name and overall size of firm.

Legal Name
Keystone Associates Architects, Engineers and Surveyors, LLC

Corporate Office
58 Exchange Street, Binghamton, NY 13901; T: (607) 722-1100; F: (607) 722-2515; info@keyscomp.com; www.keyscomp.com

Branch Offices
- 165 South Main Street, Ste. 6, Cortland, NY 13045; T: (607) 753-8015
- 30 North Street, 2nd Fl., Monticello, NY 12701

Number of Employees - 34 full time and 4 part time

Services Provided - Architecture, Civil Engineering, Environmental, Survey, NYS Building Code Analysis, Geotechnical Engineering, Sustainable Design and Management, Residential Design, Ancillary Services

Keystone Associates Architects, Engineers and Surveyors, LLC (Keystone) is a multi-disciplined design firm headquartered in Binghamton, New York, t heart of the Upstate Region. Keystone was established in 1993 and has provided professional design services for a region encompassing all of Upstate New York, as well as Northeastern Pennsylvania.

Through mergers and acquisitions, Keystone has expanded the firm and its services offered. Keystone provides an extensive menu of professional servi to a broad range of clients including municipalities, private developers, school districts, housing authorities, college and universities, utility companies a various other commercial and industrial enterprises.

Each division of Keystone is well staffed with a high quality group of licensed and certified professionals. The staff includes Registered Architects, Professional Engineers, Professional Land Surveyors, Certified Professionals in Erosion and Sediment Control (CPESC), Sustainability Design and Management Specialists, Leadership in Energy and Environmental Design Accredited Professionals (LEED AP), LEED Green Associates, Certified Environmental Professionals and an ample staff of experienced support personnel. Keystone sets high ethical and professional business standards in its work and business operation. Our professionals are members of the American Institute of Architects, Consulting Engineers Council, National Society of Professional Engineers, American Society of Civil Engineers, and the New York State Association of Land Surveyors.

2. Location of (business address) of the office that will provide engineering services.
Our Corporate Office, located at 58 Exchange Street, Binghamton, NY 13901, will provide professional services for this contract.

3. A statement of interest in performing the proposed services to include the firm's services to other Courthouse clients.
We are excited about the prospect of assisting Cortland County with this renovation project. We have completed numerous renovation projects through our 29 year history. Please refer to item 5 for our experience with historic building renovation projects.

4. A statement of qualifications to include capabilities and recent experience with Courthouse and Federally registered historic buildings.
Our expertise in designing to meet Secretary of the Interior's Standards for Rehabilitation is evidenced in our record of accomplishment on some of the Binghamton area's historic landmarks such as the Kilmer Building, Phelps Mansion, and Roberson Museum and Science Center. We are very well verse with historic rehabilitation and preservation projects. Our historic architectural knowledge of over thirty years combined staff experience equips us with sensitivity and respect for significant architecture, resulting in the successful completion of state and federal historic tax credits for the vast majority of these projects. By now it has become second nature to us when we deal with older construction, whether or not it is registered on the National Register protect and preserve the historic character of the building. We understand the significance of these irreplaceable resources in today's society and strive retain the historical integrity of these structures.

5. Recent experience in comparable Courthouse or similar historic building projects.
Please see the following project descriptions.

First Ward Action Council
Keystone was retained to provide Architectural, Engineering, Historical and Surveying Services for the substantial rehabilitation of the historic but dilapidated building at 47 North Street, built in the 1870s and known as the Sturtevant House. The project, which saved the landmark from demolition, restored the building to histori standards and created five (5) units of affordable housing with 916 square feet of first-floor community space operated by the United Way of Broome County as part of its anti-poverty program. The 47 North Resource Center also offers various workshops, youth activities, a local computer lab, printing services, job research and resume building and an overall community space. This project was part of the Crandall-North Street Revitalization project, a $10.5 million project funded by New York State Homes and Community Renewal.

Village of Johnson City
Keystone was retained to provide Architectural and Engineering Services for repairs to the historic JC Pagoda Building including Roof, Door, and Window Repairs with appropriate period colored glass for each window. It also included interior painting and lighting at exterior. The renovation kept the historic character of the structure intact.

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

Kilmer Building
The Kilmer Building, a designated National Landmark, had been unoccupied since the 1980's. Keystone was retained to develop this 1900 building into Class A Office Space. Constructed as an office and manufacturing facility at the turn of the last Century, the building had fallen into disrepair. The project consisted of the at grade parking and exterior and interior restorations, including the Kilmer Brasserie restaurant design and the Goldsmit Jewelry Store design, extensive cleaning of the floors and ceilings, patching plaster motifs and columns to bring the first floor to its original character. Exterior renovation included the cleaning of brick and stone, replacing existing deteriorated windows and doors with historically correct energy efficient windows including a store fror window wall. The project provides approximately 95,000 square feet of rental space.

Town of Chenango
Keystone was retained by the Town of Chenango to provide architectural and civil engineering services relating to the development of a new Town Hall Complex, which includes a court room and community room. Architectural and engineering services included preparation of construction documents. Keystone also provide construction phase services which involved periodic site visits, resolving questions at the project site, interpretir drawings and preparation of meeting minutes. Keystone prepared schematic sketches based on each department's requirements. The budget was finalized based on schematic design and modified several times to include the Client's overall program. The Client's mission was to service the town in an efficient way and the overall scheme of the projected turned out to meet the Client's mission. The final cost and schedule was met an the facility is functioning as intended. Keystone worked very closely with Town personnel to define the program requirements and establish spatial and facility requirements. Close and continual in-house coordination betwee our site engineers and architects was an essential part of the design process which led to the optimal layout an configuration of the proposed facilities in a manner that carefully considered the needs of Town employees as well as the access, egress and parking requirements of the general public.

Phelps Mansion
The Phelps Mansion, designed by Issac Perry, was constructed in 1870, and is on the National Register of Historic Places. Keystone was retained as architects to renovate and repair the existing structure as per State Historic Preservation Office Guidelines. Phase I - This phase of the project included cleaning exterior brick and stone. Repair deteriorated or cracked limestone and re-point deteriorated mortar joints at brick façade. Window frames were repaired and broken glass replaced. Sidewalls of exterior steps were removed to shore up the steps and reinstalled. This project was partly funded by New York State Environmental Protection Fund. Phase IB - This phase of the project included construction of 1,600 sq. ft. addition in the auditorium to accommodate handicap accessible bathrooms, service area and a wheelchair lift. The addition is compatible to the historic structure. Phase II - This phase of the project included renovation of existing basement area to accommodate th caretaker's apartment, which was the original location, including a bathroom and a kitchen. The basement had some special historic finishes, which were repaired and retained to match the original. Modern amenities were included to better serve the caretaker. Phase IIB - This phase of the project included constructing a replica of th original mansard roof structure onto the building. The design was completed utilizing a study and preliminary drawings prepared by Crawford and Sterns and existing historic photographs. The original mansard roof and third floor was removed in 1941 due to deterioration and the cost to repair and to maintain was cost prohibitive. I addition, a 2-stop residential elevator was installed to connect first and second floor.

6. Key personnel's professional background and caliber.

Our team has experienced architects in a variety of building projects that involve architectural reviews, analyses, repairs and renovations. We provide fu architectural and engineering services on historic building projects. Our designated Project Manager for this project, Kanti Patel, has 44 years extensive experience in all phases of historic restoration, rehabilitation, and adaptive use projects including building condition reports, historic evaluations and surveys, production of construction documents, construction administration, and design review for compliance with the Secretary of the Interior's Standards for Rehabilitation.

The owner & principal architect of Johnson-Schmidt, Architect, P.C., Elise Johnson-Schmidt, AIA, has a 37-year history of working with historic structure through the Historic Preservation Tax Credit program (since 1984), first as a reviewer, intern architect, advocate (who convinced her firm in Tennessee t buy and rehab the famed Southern Railway Station utilizing HP tax credits in 1988), licensed architect, former (13-year) member of the NYS Board for H & former Executive Director of Market St Restoration Agency in Corning (12 years)—the first downtown revitalization program in America, and the prog that was the prototype for the National Trust's Main Street Program. Founded not as a traditional architecture firm, but as a preservation architecture firm which works with village, county, city municipalities, IDA's, not-for-profits, private property owners, developers and the general public specifically t revitalize downtowns by adaptively reusing buildings for new uses—mostly to bring people to live downtown in mixed use buildings to establish a prese by having people occupying downtowns 24/7. Over the past 19 years, the firm has established a very experienced team who each (7 employees) have a role to play in almost every project. David Anderson, Project Manager, manages each project for a successful outcome (now 17 years with the firm). His scheduling, cost estimating, experience, pro formas, budgeting, problem solving, advocacy for success, and work closely with Elise and their clients has to scores of successful development projects across NYS from NYC to Albany, Oneonta, Elmira, Corning, Bath, Hornell, Olean, Geneva, Chautauqua and places in between. Every single project they have guided has received its historic preservation tax credits. Not one denial.

Richard J. Tarnowski, C.E.P., C.E.I., Member/Director of Environmental Services at Keystone Environmental Services, has over 45 years of extensive experience with both public and private agencies dealing with environmental consulting and remediation services. Timonty Marble, Senior Environmen Scientist, has been providing environmental management and design services for over 31 years and has extensive experience with environmental regulations governing the identification, handling, remediation, and disposal of asbestos, lead, Underground Storage Tanks, HAZMAT, noise monitoring, indoor air quality/mold issues and landfill inspections and water quality reviews.

Please see the attached resumes for our team's professional background.

7. Knowledge of projects dealing with federally registered Historic Buildings.

Keystone has a significant amount of experience in the rehabilitation of historic structures. Our members have decades of experience assisting individuals, concerned groups, and non-profit organizations with the preservation of buildings and community character. We have experience in preparing code studies, condition reports, historic structure reports, feasibility studies, preservation reports, National Register submissions, and historic resource survey The main criteria we have followed for historic structures is extensive review of the building, get input from staff and create solutions based on SHPO guidelines.

Our subconsultant, Johnson-Schmidt, Architect, P.C. (J-SA), has extensive knowledge and experience dealing with historic buildings. J-SA has been completing architectural design work for many years, primarily for historic tax credit adaptive reuse projects in the City of Elmira. The scope of work generally includes a feasibility study, followed by the development of architectural construction drawings in compliance with the Secretary of the Interio Standards for the Treatment of Historic Properties. Recently completed projects include the Water Street Row Houses, 110-120 North Main Street, 110-11 Baldwin Street, and the Foster Mansion. J-SA continues to develop both residential and commercial projects with Capriotti Properties in Elmira, with th recent addition of Clemens Square in the city center. Please see staff resumes for additional project experience.

8. Quality of references provided.

Please see item 10.

9. If a team is submitting its qualifications, the division of experience, resources, anticipated task assignments, and prior working experience a a team will be evaluated.

Information on our team members who will be directly involved in the project is presented below. Resumes listing education, specific project experience and descriptions of related projects for each individual are included on the following pages.

Name	Firm	Role
Paul L. Bedford, AIA	Keystone	Principal in Charge / Architect of Record
Kanti Patel	Keystone	Project Manager / Point of Contact
Ravi Raman, P.E.	RAM-TECH	Project Manager (MEP)
Timothy A. Myers, P.E., LEED AP	RAM-TECH	HVAC Department Manager
James M. Tighe	RAM-TECH	Plumbing Designer
Dat R. Huynh, CEP MS	RAM-TECH	Fire Protection Engineer
Elise Johnson-Schmidt, AIA	Johnson-Schmidt & Associates	Preservation Architect
David J.Anderson	Johnson-Schmidt & Associates	Vice President
Charles A. Devine	Johnson-Schmidt & Associates	Architectural Design Production Manager
Alexander Whydell	Johnson-Schmidt & Associates	Historic Preservationist
Richard Tarnowski, CEP, CEI	Keystone Environmental Services	Member / Director of Environmental Services
Timothy Marble	Keystone Environmental Services	Senior Environmental Scientist

10. A list of a minimum of 4 client references including name, address and telephone number of client. Reference should be for similar projects.

Mr. Rich David
Former Mayor, City of Binghamton
Tel: (607) 206-7193

Mr. Jerry Willard
First Ward Action Council
167 Clinton St, Binghamton, NY 13905;Tel: (607) 772-2850

Ms. Lisa Weeks
Business Manager
Oneonta City School District
31 Center Street, Oneonta, NY 13820; Tel: (607) 433-8200

Mr. Gary Hoskins
Director of Buildings and Grounds
Newark Valley Central School District
68 Wilson Creek Road, Newark Valley, NY 13811; Tel: (607) 642-3219

11. The names, qualifications and resumes of those individuals, in the office designated by the firm in item 2, above, to provide the engineering services, who will be assigned the project should the firm be selected.

Please see item 9 for our team of professionals who will be assigned to the project. Staff resumes are included on the following pages.

12. If applicable, the names of sub-consultants or associate consultants or joint-venture partner consultants who will be engaged by the firm including their background, relevant experience, qualifications of key personnel and location of offices that would provide services.

RAM-TECH Engineers, P.C. (MBE) - 6100 Fairway Dr., PO box 10, Syracuse, NY 13211-0010; Tel: 315-463-7716

RAM-TECH Engineers, strategically located in Syracuse and Buffalo, New York, is a consulting engineering firm that specializes in providing complete heating, ventilating and air conditioning, plumbing, fire protection, electrical, security, telecommunication and special systems engineering and design services. The firm's capabilities and significant expertise in these areas includes the preparation of facility surveys and evaluations, energy audits, maste plans, final design, cost estimating, construction review and construction administration. Clientele include Federal, State and Local Governmental agencies, libraries, healthcare facilities, correctional facilities, schools, colleges and universities, as well as industrial and commercial businesses. RAM-TECH's team is dedicated to creating sustainable buildings by optimizing energy performance, building automation system design, advanced mechanic electrical and plumbing design and commissioning systems for total building effectiveness. The firm provides quality engineering services while meetin client schedules and budgets. The firm is focused on the collaborative team effort that creates environmentally responsible, profitable and healthy place to live and work. RAM-TECH's ability to meet and often exceed our clients' needs is actively demonstrated by receiving over 80% of our new work from previous clients. RAM-TECH has provided MEP engineering for numerous historic buildings including:

- Landmark Theater - Syracuse, New York
- Robert C. McEwan U.S. Custom House- Ogdensburg, New York
- Mahoney State Office Building - Buffalo, New York
- Hadley Residence/Busch Estate - Cooperstown, New York
- Fayetteville Free Library - Village of Fayetteville, New York
- Beverly A. Gray Business Incubator - Buffalo, New York
- Fulton Savings Bank - Fulton, New York
- Joseph A. Griffin Visitor Center - Liverpool, New York

Johnson-Schmidt, Architect, P.C. (WBE) - 15 East Market St., Suite 202, Corning, NY 14830; Tel: (607) 937-1946
Johnson-Schmidt, Architect, P.C. (J-SA) is a very specialized Preservation Architecture firm whose focus it is to assist communities, developers & property owners to revitalize communities through the rehabilitation of commercial buildings in downtowns. J-SA provides thoughtful and creative architectural and design solutions for commercial, institutional, municipal, and residential clients. In addition to traditional architectural services, J-SA al provides comprehensive historic preservation planning and downtown revitalization services for municipalities and non-profit organizations. A few of th historic building projects include:

- Quarry Farm - Elmira, New York
- Academy Place - Corning, New York
- Painted Post Baptist Church - Painted Post, New York
- Manufacturers Hanover Building - Olean, New York
- Klugo's Parkview Place - Oneonta, New York
- Trinity Episcopal Church - Elmira, New York

Keystone Environmental Services - 58 Exchange Street, Binghamton, NY 13901; Tel: (607) 723-5117
Keystone Environmental Services (KES), a division of Keystone Material Testing, LLC, provides professional environmental consulting, inspection, testin monitoring, design, project management, subsurface investigation, and soil vapor remediation services throughout the eastern United States for a varie of sectors, including education, healthcare, industrial, transportation, commercial, municipal, and residential clients. Our environmental engineering staff includes professional engineers, biologists, environmental analysts, environmental hygienists, water and air quality specialists, mold assessors, asbestos building inspectors, air sampling technicians, project monitors, abatement project designers, lead-based paint assessors/inspectors, certified environmental professionals, and technicians. They have been trained and certified to manage environmental issues and to remain sensitive to federal a state regulations. KES recently performed various environmental consulting services at the former shoe factory known as the Victory Building in Johnso City, New York. KES' NYSDOL certified asbestos project monitors and air sampling technicians provided asbestos abatement monitoring, air sampling coordination/support as necessary to assist contractors with successful asbestos abatement in the building.

13. Identification and resume of the project manager to be designated by the firm for the services to be provided by the firm.
Mr. Kanti Patel will be our designated Project Manager for this project. Please see the following pages for his resume.

14. A listing of all subcontractors, sub-consultants or associate consultants that may supply services for this contract.
Please see item 12 for a listing of all sub-consultants.

PROJECT SPECIFICATIONS INCLUDING SCOPE OF WORK/TIMELINE

Scope of Work

It is our understanding that Cortland County would like to remodel the space in the Cortland County Courthouse to accommodate Cortland City Court. In an effort to achieve this goal, the County would like to engage the professional services of an Architectural/Engineering design team to provide design development, construction documents, bidding assistance and construction phase services.

Detailed Explanation of All Project Phases:

1. Assessment Phase
   a. Meet with County officials to discuss scope, history of repairs, SHPO compliance, budget, and review existing documentation.
   b. Conduct field investigation, prepare as-built drawings of site including elevation, levels, and document existing conditions with photos.
   c. Meet with consultants and share data collected at site.
   d. Discuss accessibility issues.

2. Schematic Design Phase
   a. Input site information in computer and share with consultants.
   b. Review material selection with County.
   c. Prepare schematic drawings and details.
   d. Prepare preliminary specifications.
   e. Meet with County officials to discuss and review design, material selection and cost.
   f. Coordination with SHPO.

3. Design Development Phase
   a. Make changes to plans and details after meeting with Client.
   b. Make changes to specifications and include front end specifications received from County (if applicable).
   c. Meet with consultant to discuss details and revise details.
   d. Meet with County officials to discuss drawings and specifications.

4. Construction Document Phase
   a. Prepare final construction documents including specifications.
   b. Meet with County officials to discuss documents and alternatives.
   c. Provide opinion of probable cost.
   d. Submission and approval from SHPO.

5. Bidding Phase
   a. Print documents and distribute to bidders.
   b. Attend pre-bid meeting.
   c. Issue addenda as required.
   d. Attend bid opening, evaluate bids and make recommendations to the County officials.

6. Construction Phase/Implementation
   a. Attend pre-construction meeting.
   b. Conduct construction meetings and visit site to review construction.
   c. Review and process submittals, review and certify pay applications, interpret documents and respond to contractors inquiries.
   d. Create punch list.
   e. Review closeout documents and forward to County officials.

Timeline

The following steps will dictate the timeline of the project completion:

1. Meeting with County officials.
2. Involvement and response by SHPO.
3. Site visits to collect data and as built of the areas.
4. Preparation of existing condition drawings in the computer.
5. Schematic design phase.
6. Construction document phase.
7. Bidding phase.
8. Construction phase.

We anticipate it will take approximately 12 months to complete the project from start of design to completion of construction, depending on material deliver during construction and SHPO review and approval timeframe.

SCHEDULE OF FEES / PROJECT BUDGET

Keystone proposes a lump sum fee of $89,800.00 for this project plus reimbursables based on the proposed renovations of 5,500 SF as stated in Addendum #7. Our Fee Schedule can be found on the following pages. In addition to the above, we propose an allowance for environmental testing (asbes lead/PCB) of $7,500.00.

PROOF THAT SIGNATORY IS AT LEAST A 50% OWNER

Per Addendum #3, Paul L. Bedford, AIA, the signator, is an owner and as such can act on behalf of the company. Please see our Articles of Organization on following pages.

PENDING LITIGATION

Keystone does not have any current or pending litigation against the firm or any of its principals as it relates to the services provided by the firm.

CONTRACT

Since the sample agreement included in the RFP seems to be geared for a contractor and not Architectural/Engineering Services, we propose the use of a negotiated AIA B101 Agreement as the form of contract.

EXCLUSIONS

- FFE design services
- Security and IT design services
- Structural design services

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

PAUL L. BEDFORD, AIA

MEMBER

EDUCATION
SUNY College at Delhi, Associate of Applied Science in Architectural Technology

LICENSES AND PROFESSIONAL ORGANIZATIONS
Registered Architect in New York and Pennsylvania
American Institute of Architects

COMMUNITY INVOLVEMENT
Past Board of Education Member and Board President for Windsor Central School District
Past Project Lead the Way Community Team Member, Windsor Central School District
Member of SUNY Delhi's Architectural Program's Advisory Council

Mr. Bedford is a Member of Keystone and has been with the firm since 1998. He is a Project Architect with 42 years of experience. Mr. Bedford has served as Project Architect in new, renovations and additions to public and private facilities. His duties include management of the architectural department, office coordination, project management, specification writing and construction administration. Some of Mr. Bedford's project experience includes the following:

- **First Ward Action Council - Binghamton, New York**
  Partner in Charge of the substantial rehabilitation of the historic but dilapidated building at 47 North Street, built in the 1870s and known as the Sturtevant House. The project created five (5) units of affordable housing. This project was part of the Crandall-North Street Revitalization project, a $10.5 million project funded by New York State Homes and Community Renewal.

- **City of Binghamton, New York**
  Partner in Charge of the Architectural Design Services Term Contract (2015-Present).

- **Broome County IDA/LDC (The Agency) - Binghamton, New York**
  Partner in Charge for the 2022-2024 Architectural & Engineering / Environmental & Civil Services Term Contract.

- **Broome County Land Bank - Binghamton, New York**
  Partner in Charge for 2022-2023 Architectural & Engineering Design Services Term Contract.

- **Strand Theatre and Stone Opera House - Binghamton, New York**
  Partner in Charge for the proposed commercial and residential development of the two historic buildings.

- **The Hayner Hoyt Corporation - Syracuse, New York**
  Partner in Charge of the renovation of an existing building in Cortland, New York, to be utilized as a space for testing lithium batteries.

- **Fairview Recovery Services - Binghamton, New York**
  Partner in Charge of the renovation of a 16,900 sf former school building known as St. Ann's School located on Adams Street in Binghamton, New York. The proposed facility will be used to provide 15 apartments for program participants. Funding for the project will be through the New York State Homeless Housing Assistance Program (HHAP).

- **Worcester Central School District - Worcester, New York**
  Partner in Charge for the Distric's $32 million referendum which included a 35,600 SF addition to the existing 1930's facility.

KANTI PATEL

SENIOR DESIGNER

EDUCATION
Maharaja Sayajirao University, Baroda, India - Bachelor of Architecture, 1976

LICENSES AND PROFESSIONAL ORGANIZATIONS
Registered with Council of Architecture, New Delhi, India, 1981

Mr. Patel has 44 years extensive experience with a variety of project types including housing, light and medium commercial buildings, office building motels, and mixed-use buildings. He has extensive experience in all phase of historic restoration, rehabilitation, and adaptive use projects including building condition reports, historic evaluations and surveys, production of construction documents, construction administration, and design review f compliance with the Secretary of the Interior's Standards for Rehabilitatio the roles of project manager and designer, he has worked on various histo renovation projects. Some of Mr. Patel's project experience is as follows:

- **First Ward Action Council - Binghamton, New York**
  Project Manager for the North of Main Revitalization Project which involves interior and exterior renovations to seven (7) existing houses units of affordable housing and the redevelopment of a vacant parcel 95 Walnut Street that will containing four (4) units.

- **First Ward Action Council - Binghamton, New York**
  Project Manager for the substantial rehabilitation of the historic building at 47 North Street, built in the 1870s and known as the Sturtevant House as well as other homes on Crandall Street. The project created five (5) units of affordable housing.

- **Roberson Museum Building - Binghamton, New York**
  Project Designer and Manager for condition assessment survey, feasibility study and preparation of construction documents for the rep of the three-story east porch area of the historic building.

- **Phelps Mansion - Binghamton, New York**
  Project Designer and Manager for the $1.1M, renovation and addition t the historic Phelps Mansion. Renovation included exterior cleaning, re of brick and stone, and window restoration. A 1,700 square foot additic to the historic building included bathrooms, handicap lift and service area. Reconstruction of mansard roof to match original roof, basement renovation to accommodate caretaker's apartment, and coordination with SHPO.

- **Kilmer Building - Binghamton, New York**
  Project Designer for the $2.4M renovation and restoration of 1904, 6-s historic Kilmer Building in downtown Binghamton for the Broome Cou IDA. Renovation included asbestos abatement, historic restoration to exterior façade, and interior restoration, complying with SHPO standa

- **Goodwill Theatre, Inc. - Johnson City, New York**
  Project Manager for the $340,000.00 roof restoration for the historic Goodwill Theatre, Inc. The work included the removal of all existing roofing and repair of the roof deck, new PVC roofing and installation including through wall flashing under the terracotta parapet caps, installation of new smoke vent on the roof of the fly tower above the stage, and the removal and repair of the ladder to the fly loft from the auditorium roof.

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

RAVI RAMAN, P.E.

PROJECT MANAGER

EDUCATION
BS - Engineering, Annamalai University, India (1981)

CERTIFICATIONS & REGISTRATIONS
Professional Engineer - New York (1989)
Professional Engineer - Pennsylvania (1987)
National Council for Engineering Examiners
Certified Construction Specifier

PROFESSIONAL AFFILIATIONS
National Society of Professional Engineers (NSPE)
Construction Specifications Institute (CSI)
American Institute of Architects - Allied Individual Member

Mr. Raman, RAM-TECH Principal and Co-Founder, has forty-one (41) years of experience as a Project Manager and Electrical / Mechanical Engineer. His expertise includes the management of mechanical, plumbing, fire protection, electrical and cogeneration systems, and has extensive experience designing mechanical, power, lighting and special systems. He has served as the Project Manager, Engineer and Field Representative for a variety of different projects, including hospitals, nursing homes, psychiatric centers, correctional institutions, public schools, universities, governmental buildings and commercial / industrial facilities.

- **Town of Sullivan – Sullivan, NY**
  State Police & Rescue Headquarters Renovation and Addition
- **New York State Troop D, City of Oneida, NY**
  Indoor Firing Range
- **Onondaga County - Countywide**
  Over 120 projects from 2002 to Present under a Term Contract, including:
  Public Safety Building Emergency Generator
  Justice Center Replace Fire Alarm Panel
  Edward Kochian County Office Building HVAC & FP Design
  Sheriff's Headquarters HVAC
  Jamesville Correctional Facility CCTV System
  Wallie Howard Jr. Center for Forensic Science HVAC Study
- **Onondaga County John C. Dillon Public Safety Building - Syracuse, NY**
  911 Room
  Standby Generator
  HVAC Study
- **New York State Office of General Services**
  Department of Corrections, Statewide - A/E Services Term Contract
  Utica State Office Building, Utica, NY - Energy Management System
  Building 12, Albany, NY - Rehabilitation
- **Town of Nichols, Nichols, NY**
  Highway Garage
- **Onondaga Community College - Syracuse, NY**
  Service and Maintenance Building
- **SUNY Upstate Medical Center - Syracuse, NY**
  Parking Garage West
- **Skaneateles Central School District - Skaneateles, NY**
  Combined-Use Garage Service Center

TIMOTHY A. MYERS, P.E., LEED AP

HVAC DEPARTMENT MANAGER

EDUCATION
BS - Mechanical Engineering, SUNY Buffalo (1983)
AS - Engineering Science, SUNY Alfred (1981)
40 Hour Value-Engineering Workshop

CERTIFICATIONS & REGISTRATIONS
Professional Engineer - New York (1988)
LEED Accredited Professional

PROFESSIONAL AFFILIATIONS
ASHRAE – Professional Member

Mr. Myers has 37 years of experience as a Senior Mechanical Engineer, including 23 years of experience as RAM-TECH's HVAC Department Manager. His expertise includes mechanical system design, project management and construction administration. Mr. Myers' system designs have included boilers, chillers, air and water distribution, water source hea pumps, industrial ventilation, waste heat recovery, process piping, plumbir fire protection and temperature controls. He has served as the Project Manager and Engineer on a wide range of projects, including hospitals, correctional institutions, public schools, airports, governmental facilities ar industrial / commercial buildings.

- **General Services Administration, Various Term Contract Projects, New York State**
  James M. Hanley Federal Building, HVAC/EMS Repairs; Kenneth Keat Federal Building, Fifth Floor Renovations, Leo O'Brien Federal Buildin Lobby
  Pre-Design Services; Robert McEwan U.S. Customs House, Various Projects'
  James T. Foley Courthouse, Correct Elevator Power Deficiencies
- **SUNY Oswego - Oswego, NY**
  Academic Building Master Plan, New Townhouse Complex (LEED Gold Certified), Master Plan
- **SUNY Alfred – Alfred, NY**
  Hinkle Library Study, Athletic Field Rehabilitation
- **Syracuse City School District - Syracuse, NY**
  Renovations and Rehabilitation – ELMS, Corcoran, Henninger, Nottingham
  Schools, 2020 Annual Visual Inspections, 2021 Building Condition Surveys
- **SUNY Canton – Canton, NY**
  Athletic Field Rehabilitation
- **SUNY Oswego - Oswego, NY**
  New Townhouse Complex, Master Plan
- **SUNY Morrisville - Morrisville, NY**
- **Onondaga Community College - Syracuse, NY**
  Chiller Replacement, Coulter Library Renovation, Day Care Center, Humidification System, Excel Building Renovation, Applied Technolog Center
- **SUNY Cortland - Cortland - NY**
  The Glass Tower (LEED Gold Certified), Sperry Learning Resource Ce DeGroat Hall Dormitory Ventilation
- **Buffalo State College, Buffalo, NY**
  Coyer Field Rehabilitation and Renovation, Moore Hall Central Service
- **SUNY Upstate Medical University - Syracuse, NY**
  Computer Warehouse Building, Vertical Expansion - Golisano Childrer Hospital

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

JAMES M. TIGHE

PLUMBING DESIGNER

EDUCATION
AAS - Architectural Technology, Onondaga Community College, Syracuse, NY
AAS - Interior Design, Cazenovia College, Cazenovia, NY

Mr. Tighe has 16 years' experience as a plumbing designer at RAM-TECH. He has been involved in all facets of plumbing design and has performed many inspections, surveys and evaluations. As a design engineer, his experience includes hospitals, health care facilities, schools, colleges, prisons, institutions and industrial/ commercial facilities.

- **Syracuse City School District – Syracuse, NY**
  2021 Building Condition Surveys
  2020 Annual Visual Inspections
  Henninger High School
  Corcoran High School
  Nottingham High School
  Frazer Elementary School
  Bellevue Elementary School
  Dr. Weeks Elementary School
  Clary Middle School
  Danforth Middle School
  Expeditionary Learning School

- **Office of Veterans Affairs - Nationwide ID/IQ Contract**
  Facility condition surveys

- **SUNY Buffalo – Buffalo, NY**
  ADA Improvements
  Moore Dining Hall Renovations

- **SUNY Brockport – Brockport, NY**
  ADA Compliant Toilet Room Renovations
  Athletic Field - Toilet Rm/Concessions Building Alterations

- **Onondaga County, Syracuse, NY**
  NBT Stadium Renovations

- **Town of Manlius – Manlius, NY**
  Manlius Fire Department – New Fire Station

- **Oneida Public Library, Oneida, NY**
  New Initiative Library

- **Buffalo City School District – Buffalo, NY**
  Buffalo Public School – PS 69
  Buffalo Public School – PS 301 Burgard High School Renovation

- **Oasis Helio Health, Clay, NY**
  Crossroads Park Drive Renovation

- **SUNY Upstate Medical University - Syracuse, NY**
  Vertical Expansion, Operating Room #5
  Parking Garage West
  Neurology Move/Renovation

DAT R. HUYNH, CET MS

FIRE PROTECTION ENGINEER

EDUCATION
MS - Advance Technology, SUNY Institute of Technology, Utica/Rome New York, Syracuse, NY (2010)
BS – Mechanical Engineering, SUNY Institute of Technology, Utica/Rome New York, Syracuse, NY (1988)

PROFESSIONAL AFFILIATIONS
Past ASPE Board Member – CNY Chapter Treasurer
Past Vietnamese Community Center- VP Strategist
Past ASME Member Member of NFPA

Mr. Huynh has over 20 years of experience in preparing and coordinating contract documents including calculations, drawings and specifications. He also has utilized Auto-CAD program to layout fire protection systems, equipment selections, pipe sizing, and details and has performed hydrauli calculations in both long hand and computer assisted using HASS softwa fire codes compliance evaluation. In addition, he has examined field conditions as required to support project development, cost estimates, attend meetings with architects, owners and building managers for projec requirements, planning, submittal reviews, and performed project closeou punch lists. Fire protection systems designed included wet-pipe, dry-pipe, pre-action for commercial high rise, warehouse, K-12 and university, medi facilities, library, record storage, outdoor sport stadium, and government buildings.

- **Syracuse City School District, Syracuse, NY**
  2021 Building Condition Surveys
  2020 Annual Visual Inspections
  Nottingham High School Alterations
  Corcoran High School Alterations
  Henninger High School Alteration
  Bellevue Elementary School Alterations
  Expeditionary Middle School Renovations
  Danforth Middle School Reconstruction

- **SUNY Oswego, Oswego, NY**
  2018 Update Facility Master Plan for Academic Space

- **Cornell University Johnson Museum Feasibility Study, Ithaca, NY**
  Review of lighting control schemes at the Herbert F. Johnson Museum of Art at Cornell University to develop a feasibility study for improvements/upgrades to the system.

- **Onondaga Community College – Mawhinney Hall Renovation, Syracuse, NY**
  Layout new fire protection and modified existing sanitary and domest water renovation project.

- **Onondaga Central School District, Syracuse, NY**
  Layout fire protection system, sanitary, storm, domestic hot and cold water, gas, acid waste systems, design for lab/classroom additions an renovations.

- **Onondaga Community College - Ferrante Hall, Syracuse, NY**
  Layout new fire protection and modified existing sanitary, domestic water, acid waste, compressed air, distilled water and gas system to se lab/classroom renovations project.

- **SUNY Brockport**
  Tuttle Hall Facility Condition Assessments

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

ELISE JOHNSON-SCHMIDT, AIA

PRESERVATION ARCHITECT

EDUCATION
Cornell University Ithaca,New York
Bachelor of Architecture 1984: Professional Architectural Curriculum
Graduate Coursework in Historic Preservation,Dean's List

CERTIFICATIONS & REGISTRATIONS
Professional Engineer - New York (1989)
Professional Engineer - Pennsylvania (1987)
National Council for Engineering Examiners
Certified Construction Specifier

PROFESSIONAL AFFILIATIONS
New York State Board for Historic Preservation, Board Member (1996- 2009)
AFFILIATIONS: New York Main Street Alliance, Founding Board Member (1991-present), Treasurer (1991- 1993)
NYS Economic Development Council (EDC), Urban Development and Revitalization Co-Chair, 2015-current
Statewide Committee to champion legislation and advocacy for community revitalization development
Working Together 2000, Chairman of Community Task Force for Downtown Revitalization in the Southern Tier,
Congressman Amory Houghton's Congressional District (1994-1996)
Preservation League of NYS, Technical Assistance Committee (1994– 1997)
Habitat for Humanity, Board of Directors (1996)
American Institute of Architects, 1991 to present
Near Westside Neighborhood Association Board Member (1990-1992)
Southside Neighborhood Association, Advisor/Board Member (1990-2000)
Tennessee Heritage Association, Board Member (1989)
Community Design Center, Knoxville, Tennessee: Volunteer design work (1988-1989)
Association for Preservation Technology (APT)
Boston Society of Architects – Women in Architecture Exhibition (1986 Exhibited)
Painted Post Baptist Church, Board of Trustees(2001– present); Building Committee Chair
National Trust for Historic Preservation
Preservation League of New York State
Orchestra of the Southern Finger Lakes, Board of Directors (2011-present)
Watson Homestead, Board of Directors and Facilities Committee (2010- present)

Thirty-six years of experience in Preservation Architecture including design, specifications,construction documents, Tax Act Applications, Historic Structure Reports, grant applications, National Register nominations, measured drawings, building code research, public technical assistance and coordination of downtown revitalization efforts and restoration.

New York State Architecture License: 1991; Pennsylvania License: 2006. Qualified as a 36 CFR
Historical Architect, Architectural Historian, Historic Preservation Planner and Historic Preservationist

Architecture and Historic Preservation Consulting (partial listing)

- RestoreNY Grant Projects, Architects for projects submitting grant applications for revitalization of historic buildings in Bath, Moravia, Elmira, Corning, Oneonta and Watkins Glen (May 2009)
- Historic Preservation Certification Applications for Tax Act Projects: 72 E Market, 91-99 E Market, 164& 166/168 Pine St, Sorge's Restaurant, 18-22 W Market, 32 W Market, 105 W Market, Corning, NY; Knoxville TN Southern Railway Station (1989);Rosenbaum's Dept Store (Elmira); Oneonta (Bresee's & Dietz); Geneva (1 Franklin Sq);Albany International; Rockaway Courthouse, NYC; Corning Free Academy (Academy Place),Corning; War Memorial Library Corning; Hawkes Building, Corning; Hawkes II, Corning, NY; 27 E Market, Corning; 29 E Market, Corning; 100W Water, Elmira; 110 North Main, Elmira; Arb Gerard,Elmira; Capriotto Baldwin,Elmira; RocklandSilk Mill, Hornell
- Wellsboro Columbarium, Architects, design a Columbarium for the Wellsboro Cemetery
- Quarry Farm (Mark Twain's former summer home), Historic Structure Report
- Corning Free Academy (Academy Pl), Architects, HP Consultant for conversion of 100,000 sf school to 58 market rate apts
- TG Hawkes Factory and offices conversion to apartments, Architects & Historic Preservation Consultants, Corning, NY
- Design for CEO of Corning Inc: Luxury Apartment; Architect, Interior Designer and HP Consultant,Corning, NY 2016
- Design of 4000 sf luxury modern home for Corning Inc Executive, Seneca Lake; Architect
- Corning Gaffer District Façade Design, Architect and HP Consultant for façade projects 2002-current
- Middletown Expanded School District Chorley School Compliance Project, HP Consultant, Middletown, NY
- New York Main Street, Architects for Elmira, NY façade program (9 projects);Addison, NY (4 projects), Corning (many)
- Schenectady County Façade Program, Architects for 10 façade projects (2009)
- 91-99 East Market Street, Architects for revitalization as seven apts/retail (July '09)
- Henkel Building Rehabilitation, Architects for revitalization as housing/retail
- Chemung County Historical Society, Master Plan for the Chemung Valley History Museum (2010-present)
- Salamanca Main Street, Design Guidelines, Façade Renovations, Streetscape Plan & Historic Resource Survey, 2010
- Watkins Glen, Historic Resource Survey and National Register Nomination, 2010-2011
- Brand Park Pool, City of Elmira, Historic Structure Report, 2010-2011
- The Park Church, Architects for Roof and exterior restoration (2007)
- Chautauqua Institution, Consultant guiding historic preservation planning (ongoing)
- John W. Jones Museum, Architect for restoration of building as museum to recognize the life of Jones and the Underground Railroad (2002-2014)
- The Pillars, National Register nomination, conditions assessment
- Preservation League of NYS, Case study comparing building codes & their implications with regard to a typical Main Street building; presented to NYS Codes Council Technical Subcommittee
- Victory House, Drawings and specs for roof restoration; conditions assessment
- 171 Cedar Arts Center, Drawings and specs for roof and paint restoration
- Elmira-Corning Regional Airport, Design, specs and construction administration for renovation of airport restaurant

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

DAVID J. ANDERSON

VICE PRESIDENT

Twenty years experience in Architecture & Historic Preservation Project Management; Project Scheduling/Phasing; Contract Administration; Specification Writing; Construction Cost Estimating; Successful communication with architects, clients, and contractors; Field experience from both contractor's and architect's viewpoint; Knowledge of methods and materials; Building Codes Review and Compliance.

- **First National Bank 2021 Olean, NY**
  Project Manager for J-SA for design of 21 apartment mixed use project totaling $9MM in an abandoned 6-story bank building in Olean. Coordination with Engineers, Developer, Contractor. Internal cost estimation, pro forma and coordination.

- **Rockland Silk Mill 2021 Hornell, NY**
  Project Manager for J-SA for design of 22 apartment project totaling $4.8MM in an abandoned silk mill in Hornell. Coordination with Engineers, Developer, Contractor. Internal cost estimation, pro forma and coordination.

- **Capriotti Baldwin 2021 Elmira, NY**
  Project Manager for J-SA for design of 11 apartment mixed use project totaling $1.6MM in a 3 story commercial building in Elmira. Coordination with Engineers, Developer, Contractor. Internal cost estimation, pro forma and coordination.

- **110 North Main 2021 Elmira, NY**
  Project Manager for J-SA for design of 16 apartment mixed use project totaling $1.5MM in the Downtown Revitalization Initiative Target Area in Elmira. Coordination with Engineers, Developer, Contractor. Internal cost estimation, pro forma and coordination.

- **Arbor Gerard 2020 Elmira, NY**
  Project Manager for J-SA for design of 28 apartment project totaling $8.6MM mixed use project in the Downtown Revitalization Initiative Target Area in Elmira. Coordination with Engineers, Developer, and Contractor.

- **100 W Water Street 2018 Elmira, NY**
  Project Manager for J-SA for design of 52 apartment project totaling 11.3M in the Downtown Revitalization Initiative Target Area in Elmira. Coordination with Engineers, Developer, Contractor. Internal cost estimation, pro forma and coordination.

- **Academy Place,former Corning Free**
  Academy 2015 Corning, NY
  Project Manager for J-SA for design of 58 apartment $12MM conversion of an old school reused as market rate apartments. Coordination with Engineers, Developer, and internal cost estimating, pro forma and coordination

CHARLES A. DEVINE

ARCHITECTURAL DESIGN PRODUCTION MANAGER

EDUCATION
SUNY Alfred State College - Bachelor of Science in Architectural Technology 2012

Nine years experience in Architecture
Drafting in AutoCAD
3D Modeling in AutoDesk Revit
Project Site Surveying and Existing Conditions Drawings Construction Documents
Code Analysis

- **First National Bank 2021 Olean, NY**
  Production Manager for J-SA for design of 21 apartment mixed use project totaling $9MM in an abandoned 6-story bank building in Olean. Coordination with Engineers, Developer, Contractor. Documentation of existing conditions, production of code review, construction documents and specifications.

- **Rockland Silk Mill 2021 Hornell, NY**
  Production Manager for J-SA for design of 22 apartment project totaling $4.8MM in an abandoned silk mill in Hornell. Coordination with Engineers, Developer, Contractor. Documentation of existing conditions, production of code review and construction documents.

- **Capriotti Baldwin 2021 Elmira, NY**
  Production Manager for J-SA for design of 11 apartment mixed use project totaling $1.6MM in a 3 story commercial building in Elmira. Coordination with Engineers, Developer, Contractor. Documentation of existing conditions, production of code review and construction documents.

- **110 North Main 2021 Elmira, NY**
  Production Manager for J-SA for design of 16 apartment mixed use project totaling $1.5MMin the Downtown Revitalization Initiative Target Area in Elmira. Coordination with Engineers, Developer, Contractor. Documentation of existing conditions, production of code review and construction documents.

- **Arbor Gerard 2020 Elmira, NY**
  Production Manager for J-SA for design of 28 apartment project totaling $8.6MM mixed use project in the Downtown Revitalization Initiative Target Area in Elmira. Coordination with Engineers, Developer, Contractor. Documentation of existing conditions, production of code review and construction documents.

- **100 W Water Street 2018 Elmira, NY**
  Draftsman for J-SA for design of 52 apartment project totaling 11.3M in the Downtown Revitalization Initiative Target Area in Elmira. Coordination with Engineers, Developer, Contractor. Documentation of existing conditions, production of code review and construction documents.

ALEXANDER WHYDELL

HISTORIC PRESERVATIONIST

EDUCATION
Master of Science in Historic Preservation, Eastern Michi University, Ypsilanti, MI. Bachelor of Arts in History, Michi Technological University, Houghton, MI

- 406-408 East Church Street, 410-416 East Church Street, 310 Academy Place, 319 William Street: Commercial Historic Tax Cre Part 2 applications including photography c building features, recording existing conditi and the scope of work for aspects of each property, and photographing the exterior and interior features of each building before work commenced. The adaptive reuse and rehabilitation project would convert offices, a historic house, and a historic tobacco warehouse into new apartment units.

- 22 West 3rd Street: Commercial Historic Ta Credit Part 3 application for an adaptive reu project converting a historic mansion house into apartment units.

- 54-56 West Market Street Corning: Commercial Historic Tax Credit Part 3 application for rehabilitating a bar spanning the first floor of both buildings and the upst apartments.

- Village of Hammondsport Historic District: Researched and recorded information about the buildings within the Village of Hammondsport to nominate the entire villa to the National Register of Historic Places, identifying which buildings contributed to th historic value of the village and which did n

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RICHARD J. TARNOWSKI, C.E.P., C.E.I.

MEMBER / DIRECTOR OF ENVIRONMENTAL SERVICES

EDUCATION
B.S. Degree - Environmental Science - West Virginia University, 1974

CERTIFICATIONS & LICENSES
NYSDOH Certified Laboratory Director
NYSDOL Licensed Asbestos Inspector and Project Monitor
NYSDOL Licensed Asbestos Air Sampling Technician
USEPA Licensed Lead Risk Assessor
NYSDOL Mold Assessor
NYSDEC Licensed Pesticide Technician
NYSDOS Licensed Real Estate Instructor
NYSDOS Licensed Home Inspector
National Environmental Health Association –
Certified Radon Mitigation Provider
OSHA 40-Hour HAZWOPER Certification
OSHA 10-Hour Construction Safety and Health Certification
Environmental Assessment Association - Certified Environmental Inspector
National Association of Environmental Professionals - Certified Environmental Professional

PROFESSIONAL AFFILIATIONS
Environmental Assessment Association
National Association of Environmental Professionals
American Association of Radon, Scientists and Technologists

Mr. Tarnowski is a Member of Keystone Environmental Services (KES). He has over 45 years of extensive experience with both public and private agencies dealing with environmental consulting and remediation services. His current duties include department/employee/project management, QA/QC for the environmental laboratory aspect of KES in addition to marketing and business development. Some of his project experience is as follows:

- Project Manager working on New York State's largest soil gas remediation projects in Endicott, New York, Hillcrest, New York, and Norwich, New York. Responsible for T0-15 soil vapor/indoor air monitoring studies and for the design, management, and supervision of Sub-Slab Depressurization System (SSDS) installation for the remediation of over 800 residential, commercial, and industrial structures.
- Project Manager for various indoor air/environmental quality investigations for residential/commercial, educational, day care, medical, sporting, and industrial clients. Services include facility testing and personal monitoring of employees. Testing performed to identify, quantify, and enumerate chemical constituents within the air. Identify source contaminants, develop engineering specifications to mitigate contaminates, and maintain regulatory compliance.
- Project Manager for Phase I/Phase II environmental site assessments performed for lending institutions throughout New York, New Jersey, Pennsylvania, and Connecticut. Services include on site inspections, on site sampling for asbestos, lead, air quality and groundwater, state/federal record review, and report preparation.
- Project Manager for the Feintool, New York, White Plains, New York, soil vapor project. Designed and managed the installation of multiple soil vapor ventilation systems to correct a Trichlorethane (TCE) vapor intrusion problem at its multi-building 45,000 sq. ft. manufacturing facility.
- Project Manager for Binghamton Plaza soil vapor project in Binghamton, New York. Designed and managed the installation of explosion proof sub-slab Depressurization Systems (SSDS) to correct methane gas seepage from a previous landfill site that caused vapor intrusion issues at an existing day care facility, bank, and fast food restaurant.
- Project Manager for environmental health study dealing with TCE soil vapor migration through residential structures in Endicott, New York. Services included owner contact and scheduling, on site investigation, data gathering per EPA's "Guidance for Evaluating the Vapor Intrusion to Indoor Air Pathway From Groundwater and Soils", and report preparation.

TIMOTHY W. MARBLE

SENIOR ENVIRONMENTAL SCIENTIST

EDUCATION
Broome Community College - Civil Engineering
Broome Community College – Business Administration

CERTIFICATIONS & LICENSES
OSHA Hazard Communication Program Certification
OSHA Safety & Health Program Certification
OSHA Construction Safety Program Certification
NYSDOL Asbestos Inspector
NYSDOL Asbestos Air Sampling Technician
NYSDOL Asbestos Project Monitor
NYSDOL Asbestos Project Designer
NYSDOL Mold Assessor
PA Asbestos Inspector
USEPA Lead Inspector

PROFESSIONAL AFFILIATIONS
Environmental Information Association
Professional Abatement Contractors of New York (PACNY)
Environmental Health & Safety Professionals
Indoor Air Quality Association (IAQA)
Lead Inspector Professional Network
American Industrial Hygiene Association (AIHA)
CSI - Construction Specifications Institute

Mr. Marble has been providing environmental management and design services for over 31 years, with responsibilities for field testing, monitoring, staff supervision and training, project management, budgeting, estimating specifications maintenance, general office, and administrative support. Mr Marble has extensive experience with environmental regulations governin the identification, handling, remediation, and disposal of asbestos, lead, Underground Storage Tanks, HAZMAT, noise monitoring, indoor air quality mold issues and landfill inspections and water quality reviews. Mr. Marble other responsibilities include field investigations and supervision, project team participation, staff assignment, environmental design, NYSDOL site specific variances, client and contractor relations, construction coordinatic services, CADD, project related financial management, proposal preparati quality control and quality assurance reviews, technical review and suppo regulatory compliance reviews, marketing, soil vapor remediation, clerk of works, geotechnical field supervision of drilling operations, collection and evaluation of soil and rock samples, preparation of subsurface logs, establishing existing grade evaluations at boring locations, and general project support. Some of his project experience is as follows:

- Auburn Correctional Facility - Facility wide CCTV - Asbestos Inspecto and Design and Project Administration for Independent Asbestos Consultant Opinion Report
- Liberty Central School District - Asbestos, Lead and PCB Reviews an Design, Project Administration, UST Remediation, IAQ
- Binghamton University - Asbestos Reviews and Design, Project Administration, Geotechnical Drilling, Project Monitoring and Air Sampling
- Broome County Bridge Wearing Surface Project - Asbestos Testing and Pavement Cores, Project Administration, Indoor Air Quality (Mold Geotechnical Drilling
- Broome County Land Bank Corporation - Asbestos Testing and Desig Radon Testing, Lead Testing, Project Administration, and Construction Inspection
- Tioga County - New Building Campus - Asbestos/Lead/HAZMAT Testing, Asbestos/HAZMAT Design and Project Administration –
- Steuben County Government - Asbestos Testing and Design, Project Administration
- Binghamton Housing Authority - Asbestos Review/Testing, Project Monitoring/Air Sampling, Design, Project Administration and Preparat of NYS Approved Site Specific Variances

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KEYSTONE ASSOCIATES
ARCHITECTS | ENGINEERS | SURVEYORS

2022 FEE SCHEDULE

HOURLY RATES

Managing Member / Member	$170.00/Hour	Sustainability Manager	$ 80.00/Hour
Sr. Architect / Sr. Engineer / Sr. Surveyor	$140.00/Hour	Environmental Scientist	$ 75.00/Hour
Architect / Engineer / Surveyor	$120.00/Hour	Sr. Technician	$ 80.00/Hour
Sr. Environmental Scientist	$120.00/Hour	Survey Technician	$ 80.00/Hour
Sr. Construction Manager	$110.00/Hour	Technician	$ 70.00/Hour
Sr. Designer	$120.00/Hour	Construction Administrator	$ 70.00/Hour
Designer	$ 90.00/Hour	Administration	$ 60.00/Hour

ADDITIONAL RATES

One (1) Man Crew w/GPS or Robotic	$100.00/Hour
Expert Testimony & Related Investigations	$150.00/Hour
NYS Prevailing Wage Rates One (1) Man Crew Two (2) Man Crew Three (3) Man Crew (All counties except as follows: Delaware, Orange, Rockland, Sullivan, Ulster Counties)	 $120.00/Hour $240.00/Hour $360.00/Hour
NYS Prevailing Wage Rates for Delaware, Orange, Rockland, Sullivan, Ulster Counties One (1) Man Crew Two (2) Man Crew Three (3) Man Crew	 $140.00/Hour $280.00/Hour $420.00/Hour

The above hourly rates include compensation for professional, technical and non-technical personnel time, equipment, materials, and overhead, which ordinarily would be incurred during the performance of our work. Services are normally billed monthly. A finance charge of 1.5% per month will be billed on all accounts not paid within 30 days of the invoice date. Member designates ownership percentage of firm.

The following reimbursable expenses are also included for your information:

REIMBURSABLE EXPENSES

Reproduction/Prints	
In-House Prints 24x36	$2.50/Each
In-House Prints 30x42	$3.00/Each
In-House Mylars 24x36	$10.00/Each
In-House Mylars 30x42	$15.00/Each

Photocopies	
In-House Service 8-1/2x11	$0.15/Each
In-House Service 8-1/2x14	$0.20/Each
In-House Service 11x17	$0.30/Each
Outside Services	Cost + 15%

Postage/Courier	
Bulk Postage, Express Mail, UPS, FedEx, DHL, etc.	Cost + 15%

Miscellaneous	
Consumable Supplies (*Project Related*)	Cost + 15%
Outside Services	Cost + 15%
Geotechnical Drilling Services	Cost + 15%

Travel	
Mileage	$0.60/Mile
Meals/Lodging	Cost + 15%
Vehicle Rental/Fuel	Cost + 15%

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Proposals MUST include:

✓ A. Name, contact, address, telephone number, fax number and email address of your firm/business.

✓ B. Project Specifications including scope of work/timeline.

✓ C. Schedule of Fees / Project Budget.

✓ D. Copies of all licenses, permits and certifications relating to the necessary qualifications for this RFP.

✓ E. NYS Certificate of Authority to do Business in New York State.

✓ F. Proof that signatory is at least a 50% owner and has the authority to act on behalf of the firm/business.

✓ G. References; all qualified firms must submit a list of at least three firms, organizations or major customers to whom they have provided services within the previous five years. This information should include name, address, phone & email information of each reference. Letters of recommendation and references from other municipalities or public agencies are preferred.

✓ H. Information on any current or pending litigation against the firm or any of its principals as it relates to the services provided by the firm.

✓ I. Current W-9.

✓ J. Proof of Insurance (Liability, Disability, Workers' Compensation, Vehicle, etc.) **NOTE:** Successful proposer will be required to name "County of Cortland" as an additional insured; for contracts over $25,000 insurance must include 'per project aggregate' endorsement.

N/A K. Copy of active NYS MWBE Certification (*if applicable*).

✓ L. Exhibit A: Acknowledgement and Agreement to Comply with Standard Clauses for NYS Contracts.

✓ M. Exhibit B: Drug Free Workplace.

✓ N. Exhibit C: Non-Collusive Bidding Certification Required by §139-D of the State Finance Law.

✓ O. Exhibit D: Conflict of Interest Disclosure.

✓ P. Exhibit E: Privacy and Security HIPPA Compliance (*if applicable*).

✓ Q. Exhibit F: Qualification Questionnaire.

✓ R. Any other information you feel is appropriate to assist in the selection process.

EXHIBIT A – ACKNOWLEDGEMENT AND AGREEMENT TO COMPLY WITH STANDARD CLAUSES FOR NEW YORK STATE CONTRACTS (APPENDIX A)

I hereby acknowledge that I have read, understand and agree to comply with the terms as outlined in Appendix A – Standard Clauses for New York State Contracts. Failure to comply may result in immediate termination of this agreement with potential legal recourse by the County.

Signed: _____ Date: 11/18/22

Title: Member

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

CORTLAND COUNTY ADDENDA
ACKNOWLEDGEMENT FORM
Submit with Bid

BIDDER acknowledges receipt of the following addenda (as applicable):

Addendum No. 1 CP Initial Date: 11/3/22

Addendum No. 2 CP Initial Date: 11/4/22

Addendum No. 3 CP Initial Date: 11/4/22

Addendum No. 4 CP Initial Date: 11/7/22

Addendum No. 5 CP Initial Date: 11/14/22

Addendum No. 6 CP Initial Date: 11/15/22

Addendum No. 7 CP Initial Date: 11/15/22

Keystone Associates Architects, Engineers and Surveyors, LLC

(Name of Bidder or Firm)

Christie Peterson

(Company Representative)

11/15/22

(Date)

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

EXHIBIT B – DRUG FREE WORKPLACE

Whenever two or more Bids which are equal with respect to price, quality and service are received by the State or by any political subdivisions for the procurement of commodities or contractual services, a Bid received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. Established procedures for processing the Bids will be followed if none of the tied vendors have a drug free workplace process. In order to have a drug-free workplace program, a business shall:

1) Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2) Inform employees about the dangers of drug abuse in the workplace, the business' policy of maintaining a drug free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3) Give each employee engaged in providing the commodities or contractual services that are under Bid a copy of the statement specified in Subsection (1).
4) In the statement specified in Subsection (1), notify that employees, that, as a condition of working of the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employee of any conviction of, or plea of guilty or nolo contendere to, any violation of any controlled substance law in the United States or any state or Cortland County, for a violation occurring in the workplace no later than five (5) days after such conviction.
5) Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program, if such is available in the employee's community, by any employee who is so convicted.
6) Make a good faith effort to continue to maintain a drug free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies with the above requirements.

Print Name: Paul L. Bedford, AIA Date: 11/18/22

Signature: _____ Title: Member

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

EXHIBIT C - NON COLLUSIVE BIDDING CERTIFICATE REQUIRED BY SECTION 139-D OF THE STATE FINANCE LAW

Section 139D, Statement of Non-Collusion in bids to the State:

By submission of this bid, bidder and each person signing on behalf of bidder certifies, and in the case of joint bid, each party thereto certifies as its own organization, under penalty of perjury, that to the best of his/her knowledge, and belief:

1) The prices of this bid have been arrived at independently, without collusion, consultation, communication, or agreement, for the purposes of restricting competition, as to any matter relating to such prices with any other bidder or with any other competitor;
2) Unless otherwise required by law, the prices which have been quoted in this bid have not been knowingly disclosed by the Bidder and will not knowingly be disclosed by the Bidder prior to opening, directly or indirectly, to any other bidder or to any competitor; and
3) No attempt has been made or will be made by the Bidder to induce any other person, partnership or corporation to submit or not to submit a bid for the purpose of restricting completion.

A Bid shall not be considered for award nor shall any award be made where 1, 2, 3 above have not been complied with; provided however, that if in any case, the bidder(s) cannot make the foregoing certification, the bidder shall so state and shall furnish below a signed statement which sets forth in detail the reasons therefore:

(Affix addendum to this page if space is required for statement.)

Subscribed to me under penalty of perjury under the laws of the State of New York, this 18th day of November, 2022 as the act and deed of said corporation of partnership or sole proprietor.

If Bidders are a Partnership, complete the Following:

Names of Partners or Principals	Legal Residence
Kenneth Ellsworth	128 Dodd Road, Windsor, NY 13865
Paul Bedford	1 Norton Road, Binghamton, NY 13901
Rodney Carey	143 Meadow Dale Circle, Kingsport, TN 37663-2875

If Bidders are a corporation, complete the following:

Name	Legal Residence
President	
Vice President	
Secretary	
Treasurer	

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

Identifying Data:

Potential Contractor: Keystone Associates, Architects, Engineers and Surveyors, LLC
Address: 58 Exchange Street
Telephone #: (607) 722-1100 Title: Member
E-Mail Address: pbedford@keyscomp.com

If applicable, Responsible Corporate Officer
Name: _____ Title: _____

Signature: _____

Joint or combined bids by companies or firms must be certified by each participant.

Legal name of person or firm	Legal name of person or firm
Name	Name
Title	Title
Address	Address

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

EXHIBIT D - CONFLICT OF INTEREST DISCLOSURE

Conflict of Interest Disclosure Form

Note: A potential or actual conflict of interest exists when commitments and obligations are likely to be compromised by the nominator(s)'other material interests, or relationships (especially economic), particularly if those interests or commitments are not disclosed.

This Conflict of Interest Form should indicate whether the nominator(s) has an economic interest in, or acts as an officer or a director of, any outside entity whose financial interests would reasonably appear to be affected by the contract. The nominator(s) should also disclose any personal, business, or volunteer affiliations that may give rise to a real or apparent conflict of interest. Relevant Federally and organizationally established regulations and guidelines in financial conflicts must be abided by. Individuals with a conflict of interest should refrain from bidding and/or contracting.

Date: 11/18/22

Name: Paul L. Bedford, AIA

Position: Member

Please describe below any relationships, transactions, positions you hold (volunteer or otherwise), or circumstances that you believe could contribute to a conflict of interest:

X I have no conflict of interest to report.

_____ I have the following conflict of interest to report (please specify other nonprofit and for-profit boards you (and your spouse) sit on, any for-profit businesses for which you or an immediate family member are an officer or director, or a majority shareholder, and the name of your employer and any businesses you or a family member own):

1. _____
2. _____
3. _____

I hereby certify that the information set forth above is true and complete to the best of my knowledge.

Signature:

Company: Keystone Associates Architects, Engineers and Surveyors, LLC

Date: 11/18/22

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

EXHIBIT E

PRIVACY AND SECURITY (HIPAA)

The purpose of this clause is to set forth the requirements for privacy and security of protected health information ("PHI") mandated by 45 CFR Part 164 as they apply to the services provided by CONTRACTOR on behalf of COUNTY.

(A) CONTRACTOR understands the importance of the privacy of a patient's PHI, and agrees to protect that right to the extent necessary under this Agreement and under current federal, state, and local regulations and laws. All PHI will be handled in a private and/or confidential manner. For purposes of this Agreement, PHI is any data or other information as defined by the Department of Health and Human Services in the Code of Federal Regulations, 45 CFR §164.501.

(B) Further, CONTRACTOR understands that County's patients are intended third-party beneficiaries of this Agreement, and have all the rights and privileges of any third-party beneficiary under current law.

(C) Uses and disclosures of PHI that are permitted are those necessary in order for CONTRACTOR to:

1. Properly manage and administer its functions.
2. Meet its legal responsibilities.
3. Provide data aggregation services relating to the health care operations of the COUNTY.
4. Make those disclosures required by law such as in situations of abuse, neglect, or domestic violence. The uses and disclosures permitted are limited to the PHI necessary to meet the requirements of the law that compels the use or disclosure.
5. Make disclosures in response to a judicial or administrative proceeding through a lawful process such as a subpoena or discovery request.

(D) The uses and disclosures of PHI that are required are those disclosures necessary:

1. For patients to review their PHI.
2. To provide an accounting of disclosures in accordance with 45 CFR §164.528.
3. To allow the Secretary of Health and Human Services to determine County's compliance with 45 CFR §164.504.

(E) CONTRACTOR shall make the following assurances to COUNTY:

1. CONTRACTOR agrees that it shall not use or disclose any patient's PHI for any purpose not expressly stated in this Agreement. Further, CONTRACTOR shall not use or disclose PHI in any manner or context prohibited by the Health Insurance Portability and Accountability Act of 1996 ("HIPAA") and subsequent federal,

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

state, and local stated in this Agreement, it shall immediately cease the unauthorized use or disclosure, and shall notify COUNTY in writing of such use or disclosure. CONTRACTOR agrees to mitigate, to the extent practicable, any harmful effect known to it of a use or disclosure of PHI not allowed under this Agreement.

2. CONTRACTOR further agrees that any sub-contractors or other persons or entities not directly employed by CONTRACTOR who use or disclose PHI obtained from COUNTY, shall abide by terms of this clause of this Agreement. Any sub-contractor or other person or entity not directly employed by CONTRACTOR that has used or disclosed PHI without proper authorization (as defined in HIPAA and subsequent federal, state, and local regulations) shall be considered to have acted as an agent of CONTRACTOR, and have violated the terms of this Agreement. COUNTY may consider this use or disclosure a material breach of this Agreement.
3. By signing this Agreement, CONTRACTOR is assuring COUNTY it has met the minimum safeguards necessary to protect unauthorized use or disclosure of PHI to any person or entity not party to this Agreement. Such safeguards shall include the security safeguards outlined by the 1996 Health Insurance Portability and Accountability Act and subsequent federal regulation, including: physical access to PHI, technical access to PHI, and administrative policies and procedures addressing security of PHI.
4. Provider shall report to COUNTY any instance or circumstance in which PHI has been used or disclosed by an unauthorized person or entity, including accidental disclosure by CONTRACTOR. CONTRACTOR shall notify COUNTY in writing of any steps or procedural changes made to address the unauthorized use or disclosure.
5. Should COUNTY find PHI used or disclosed to CONTRACTOR to be inaccurate or incomplete, CONTRACTOR shall incorporate any amendments or corrections to the PHI at COUNTY's request.
6. CONTRACTOR will make PHI available to the individual who is the subject of the PHI for amendment. Such requests by the individual for their PHI from CONTRACTOR will be made through County. CONTRACTOR will incorporate any amendments to PHI that have been made by COUNTY by virtue of the individual's request for amendment.
7. CONTRACTOR will provide a timely accounting to the individual or to COUNTY, if requested by either, of the disclosures of an individual's PHI.
8. Should CONTRACTOR make any material alterations to the PHI while the PHI is in its possession, CONTRACTOR shall notify COUNTY of such alterations so that COUNTY may inform the patient who is the subject of the PH
9. At the termination of this Agreement, CONTRACTOR shall return or destroy to the satisfaction of COUNTY any PHI held or maintained by CONTRACTOR and retain no copies of such information. If COUNTY and CONTRACTOR mutually agree that returning or destroying the PHI is not feasible or permitted under law, the PHI will remain

protected after this agreement ends for as long as CONTRACTOR maintains the information. Further uses or disclosures of the PHI will be limited to those purposes that make the return or destruction infeasible.

(F) If COUNTY determines CONTRACTOR has violated any of the above assurances, covenants or terms, the CONTRACTOR has committed a material breach of this Agreement. COUNTY may then provide CONTRACTOR with an opportunity to cure the breach or may terminate this Agreement and may report the violations to the Department of Health and Human Services ("HHS") or other federal or state entity for possible prosecution or sanctions.

(G) Both parties to this agreement agree that they will protect the integrity and confidentiality of any PHI being shared electronically.

(H) CONTRACTOR hereby gives COUNTY and the Department of Health and Human Services (or an agent acting on behalf of HHS) the express right to inspect any and all internal practices, books, and records relating to the use or disclosure of PHI by CONTRACTOR. If HHS suspects an unauthorized use or disclosure of PHI by CONTRACTOR, HHS is authorized to pursue an investigation into CONTRACTOR's activities for the purposes of determining whether an unauthorized use or disclosure of PHI has taken place.

(I) CONTRACTOR may have policies and procedures relating to privacy and security in place prior to the commencement of this Agreement. If, after reasonable investigation, COUNTY concludes CONTRACTOR's policies and procedures to be "adequate" protection of a patient's privacy rights relating to PHI, CONTRATOR may elect to continue to use its own policies and procedures. The term "adequate" in this clause means CONTRACTOR's policies and procedures meet the minimum privacy and security standards as set forth in COUNTY's privacy and security policies and procedures.

(J) COUNTY, through the appropriate Department will:

1. provide CONTRACTOR with its Privacy Notice;
2. provide CONTRACTOR with any changes in, or revocation of, permission by a patient to use or disclose PHI, if such changes affect CONTRACTOR's permitted or required uses or disclosures; and
3. notify CONTRACTOR of any restriction to the use or disclosure of PHI to which the COUNTY has agreed.

(K) Implement administrative, physical, and technical safeguards that reasonably and appropriately protect the confidentiality, integrity, and availability of the electronic protected health information (ePHI) that it creates, receives, maintains, or transmits on behalf of Cortland County.

(L) Ensure that any agent, including a subcontractor, to whom Contractor provides ePHI agrees to implement reasonable and appropriate safeguards to protect this information.

(M) Report to Security Officer of Cortland County any security incidents of which it

becomes aware. (A security incident is defined as the attempted or successful unauthorized access, use, disclosure, modification, or destruction of information or interference with system operations in an information system.)

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

EXHIBIT F – QUALIFICATION QUESTIONNAIRE

All vendors must complete this questionnaire in order to be included in the evaluation of the proposals. The information supplied will enable the County to determine whether or not the vendor has adequate personnel and facilities to properly perform the work.

1. Facility Name and Physical Address: Keystone Associates Architects, Engineers and Surveyors, LLC
   58 Exchange Street, Binghamton, NY 13901
2. Normal Operating Hours:
   a. Weekdays 8:00 am to 5:00 pm
   b. Saturdays Closed am to Closed pm
   c. Sundays Closed am to Closed pm
   d. Holidays Closed am to Closed pm
3. Number of Years in Business: 29
4. Firm History (attach additional pages as necessary): Please see the previous pages of this proposal.
5. Number of employees on your payroll: 38
6. Do any of your employees have any other special certifications or rating? (Yes) / No
   If yes, specify: We have Professional Engineers, Registered Architects, and Professional Land Surveyors. Please see the previous pages of this proposal for additional staff certifications.
7. Do you have any special equipment that is available to service the County RFP? Yes / No
   If yes, specify: N/A
8. What is the overall size of your facility? 14,790 SF
9. Do you have a locked, fenced and secured storage area? (Yes) / No
10. How far in advance must appointments be scheduled? 24 hours if possible
11. In case of emergency, will you accommodate the County with same day services when possible?
    (Yes) / No
12. Shop Distance from 60 Central Avenue, Cortland, NY 43 miles

In submitting this proposal, it is understood that the unrestricted right is reserved by the County in making the award to reject any and all proposals or parts thereof, or to waive any informalities or technicalities in said bids. The undersigned hereby certifies that this bid is genuine, and not a sham or collusive, or made in the interest or in behalf of any person, firm or corporation not herein named; that the undersigned has not directly or indirectly induced or solicited any bidder to refrain from bidding, and that the undersigned has it, in any manner, sought by collusion to secure for himself and advantage over any another bidder.

Paul L. Bedford, AIA	
PRINT NAME	SIGNATURE (Must be 50% Company Owner) *
Member	11/18/22
TITLE	DATE

*Signatory has the authority to act on behalf of the firm/business.

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

▶ **Go to *www.irs.gov/FormW9* for instructions and the latest information.**

Give Form to the requester. Do not send to the IRS.

Print or type. See **Specific Instructions** on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

Keystone Associates Architects, Engineers and Surveyors, LLC

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☑ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ P

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ▶

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any)

Exemption from FATCA reporting code (if any)

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

58 Exchange Street

6 City, state, and ZIP code

Binghamton, NY 13901

Requester's name and address (optional)

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN,* later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

			–			–				

or

Employer identification number

1	6	–	1	5	1	1	4	3	3

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here **Signature of U.S. person ▶** Lee Ann Simons **Date ▶** 11/18/22

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9.*

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, *later.*

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 11/14/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	CONTACT NAME: Timothy Esler
Fenner & Esler Agency, Inc 467 Kinderkamack Road P. O. Box 60 Oradell NJ 07649-0060	PHONE (A/C, No, Ext): (201) 262-1200 FAX (A/C, No): (201) 262-7810 E-MAIL ADDRESS: certs@fenner-esler.com

INSURED	INSURER(S) AFFORDING COVERAGE	NAIC #
Keystone Associates Architects Engineers And Surveyors, LLC 58 Exchange Street Binghamton NY 13901	INSURER A : Travelers Property Casualty Co. of America	25674
	INSURER B : The Travelers Indemnity Co.	25658
	INSURER C : Travelers Indem Co/Connecticut	25682
	INSURER D : Berkley Insurance Company-	32603-
	INSURER E :	
	INSURER F :	

COVERAGES **CERTIFICATE NUMBER:** Master 22-23 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	[X] COMMERCIAL GENERAL LIABILITY [ ] CLAIMS-MADE [X] OCCUR [X] Includes Contractual & XCU Cov [ ] per policy terms & conditions GEN'L AGGREGATE LIMIT APPLIES PER: [ ] POLICY [X] PRO-JECT [ ] LOC [X] OTHER: incl cov within 50' of RR	Y		680-2H472233-22-47	05/01/2022	05/01/2023	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG Valuable Papers	$ 2,000,000 $ 1,000,000 $ 10,000 $ 2,000,000 $ 4,000,000 $ 4,000,000 $ 100,000
	AUTOMOBILE LIABILITY [ ] ANY AUTO [ ] OWNED AUTOS ONLY [ ] SCHEDULED AUTOS [ ] HIRED AUTOS ONLY [ ] NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$ $ $ $
B	[ ] UMBRELLA LIAB [X] OCCUR [X] EXCESS LIAB [ ] CLAIMS-MADE [ ] DED [X] RETENTION $ 10,000			CUP-3724R234-22-47	05/01/2022	05/01/2023	EACH OCCURRENCE AGGREGATE	$ 5,000,000 $ 5,000,000
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) Y/N: N If yes, describe under DESCRIPTION OF OPERATIONS below	N / A		UB-4K768238-22-47-G	05/01/2022	05/01/2023	[X] PER STATUTE [ ] OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	$ 1,000,000 $ 1,000,000 $ 1,000,000
D	Professional Liability Retro Active Date: 1/1/1901			AEC-9059699-03	10/16/2022	10/16/2023	Per Claim Limit Aggregate Limit Per Claim Deductible	$3,000,000 $5,000,000 $25,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Additional Insured - Certificate Holder as respects general liability where required by written contract.

CERTIFICATE HOLDER

Cortland County
60 Central Ave.
Cortland NY 13045

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

KEYSASS-01 KLISHM

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 11/14/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	CONTACT NAME: Samantha Vore
Insurance Office of America 31 Lewis Street Suite 201 Binghamton, NY 13901	PHONE (A/C, No, Ext): (607) 338-1247 45229 FAX (A/C, No): (607) 754-9797 E-MAIL ADDRESS: Samantha.Vore@ioausa.com
	INSURER(S) AFFORDING COVERAGE — NAIC #
	INSURER A : Selective Insurance Company of America — 12572
INSURED Keystone Associates, Architects, Engineers & Surveyors, LLC 58 Exchange St Binghamton, NY 13901	INSURER B : INSURER C : INSURER D : INSURER E : INSURER F :

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
	COMMERCIAL GENERAL LIABILITY						EACH OCCURRENCE	$
	[ ] CLAIMS-MADE [ ] OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$
							MED EXP (Any one person)	$
							PERSONAL & ADV INJURY	$
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$
	[ ] POLICY [ ] PRO-JECT [ ] LOC						PRODUCTS - COMP/OP AGG	$
	[ ] OTHER:							$
A	AUTOMOBILE LIABILITY						COMBINED SINGLE LIMIT (Ea accident)	$ 1,000,000
	[X] ANY AUTO	X	X	S2265361	6/1/2022	6/1/2023	BODILY INJURY (Per person)	$
	[ ] OWNED AUTOS ONLY [ ] SCHEDULED AUTOS						BODILY INJURY (Per accident)	$
	[ ] HIRED AUTOS ONLY [ ] NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$
								$
	[ ] UMBRELLA LIAB [ ] OCCUR						EACH OCCURRENCE	$
	[ ] EXCESS LIAB [ ] CLAIMS-MADE						AGGREGATE	$
	[ ] DED [ ] RETENTION $							$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y / N						[ ] PER STATUTE [ ] OTH-ER	
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? [ ] (Mandatory in NH)	N / A					E.L. EACH ACCIDENT	$
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE	$
							E.L. DISEASE - POLICY LIMIT	$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Cortland County and all other parties as required by written contract shall be named as additional insured on a primary and noncontributory basis in regard to auto per form #CA 7809NY. A Waiver of Subrogation applies in favor of the certificate holder, owner and all other parties as required by written contract in regard to auto per form #CA 7809NY.

CERTIFICATE HOLDER

Cortland County
60 Central Ave.
Cortland, NY 13045

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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ElitePac®
Commercial Automobile Extension

COMMERCIAL AUTO
CA 78 09NY 11 17

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

This endorsement modifies insurance provided under the following:

BUSINESS AUTO COVERAGE FORM

With respect to coverage provided by this endorsement, the provisions of the Business Auto Coverage Form apply unless modified by the endorsement.

AMENDMENTS TO SECTION II - LIABILITY COVERAGE

A. If this policy provides Auto Liability coverage for Owned Autos, the following extensions are applicable accordingly:

NEWLY ACQUIRED OR FORMED ORGANIZATIONS

The following is added to **SECTION II, A.1. - Who Is An Insured:**

Any organization you newly acquire or form, other than a partnership, joint venture or limited liability company over which you maintain ownership or majority interest, will qualify as a Named Insured if there is no similar insurance available to that organization. However:

1. Coverage under this provision is afforded only until the 180th day after you acquire or form the organization or the end of the policy period, whichever is earlier;

2. Coverage does not apply to "bodily injury" or "property damage" resulting from an "accident" that occurred before you acquired or formed the organization.

No person or organization is an "insured" with respect to the conduct of any current or past partnership, joint venture or limited liability company that is not shown as a Named Insured in the Declarations.

EXPENSES FOR BAIL BONDS AND LOSS OF EARNINGS

Paragraphs **(2)** and **(4)** of **SECTION II, A.2.a. - Supplementary Payments** are deleted in their entirety and replaced with the following:

(2) Up to the Limit of Insurance shown on the ElitePac Schedule for the cost of bail bonds (including bonds for related traffic law violations) required because of an "accident" covered under this policy. We do not have to furnish these bonds.

(4) All reasonable expenses incurred by the "insured" at our request. This includes actual loss of earnings because of time off from work, which we will pay up to the Limit of Insurance shown on the ElitePac Schedule.

EMPLOYEE INDEMNIFICATION AND EMPLOYER'S LIABILITY AMENDMENT

The following is added to SECTION **II, B.4. - Exclusions**

This exclusion does not apply to a "volunteer worker" who is not entitled to workers compensation, disability or unemployment compensation benefits.

FELLOW EMPLOYEE COVERAGE

The **Fellow Employee** Exclusion, **SECTION II, B.5. -** is deleted in its entirety.

CARE, CUSTODY OR CONTROL AMENDMENT

The following is added to **SECTION II, B.6. - Exclusions:**

This exclusion does not apply to property owned by anyone other than an "insured", subject to the following:

1. The most we will pay under this exception for any one "accident" is the Limit of Insurance stated in the ElitePac Schedule; and

2. A per "accident" deductible as stated in the ElitePac Schedule applies to this exception.

B. If this policy provides Auto Liability coverage for Owned Autos or Non-Owned Autos, the following extension is applicable accordingly:

LIMITED LIABILITY COMPANIES

The following is added to **SECTION II, A.1. - Who Is An Insured:**

If you are a limited liability company, your members and managers are "insureds" while using a covered "auto" you don't own, hire or borrow during the course of their duties for you.

BLANKET ADDITIONAL INSUREDS - As Required By Contract

The following is added to **SECTION II, A.1. - Who Is An Insured:**

Any person or organization whom you have agreed in a written contract, written agreement or written permit that such person or organization be added as an additional "insured" on your policy. Such person or organization is an additional "insured" only with respect to liability for

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

"bodily injury" or "property damage" caused, in whole or in part, by your ownership, maintenance or use of a covered "auto". This coverage shall be primary and non-contributory with respect to the additional "insured". This provision only applies if:

1. It is required in the written contract, written agreement or written permit identified in this section;
2. It is permitted by law; and
3. The written contract or written agreement has been executed (executed means signed by a named insured) or written permit issued prior to the "bodily injury" or "property damage".

C. If this policy provides Auto Liability coverage for Non-Owned Autos, the following extension is applicable accordingly:

EMPLOYEES AS INSUREDS

If this policy provides Auto Liability coverage for Non-Owned Autos, the following is added to **SECTION II, A.1. - Who Is An Insured:**

Any "employee" of yours is an "insured" while using a covered "auto" you don't own, hire or borrow in your business or your personal affairs.

An "employee" of yours is an "insured" while operating an "auto" hired or rented under a contract or agreement in that "employee's" name with your permission, while performing duties related to the conduct of your business.

AMENDMENTS TO SECTION III - PHYSICAL DAMAGE COVERAGE

If this policy provides Comprehensive, Specified Causes of Loss or Collision coverage, the following extensions are applicable for those "autos" for which Comprehensive, Specified Causes of Loss or Collision coverage is purchased:

TOWING AND LABOR

SECTION III, A.2. - Towing is deleted in its entirety and replaced with the following:

We will pay all reasonable towing and labor costs up to the maximum Limit of Insurance shown on the ElitePac Schedule per tow each time a covered "Private Passenger Auto", "Social Service Van or Bus" or "Light Truck" is disabled and up to the maximum Limit of Insurance per tow each time a covered "Medium Truck", "Heavy Truck" or "Extra Heavy Truck" is disabled.

For labor charges to be eligible for reimbursement the labor must be performed at the place of disablement.

This coverage extension does not apply to Emergency Services Organizations and Governmental Entities.

GLASS BREAKAGE DEDUCTIBLE

The following is added to **SECTION III, A.3. - Glass Breakage - Hitting A Bird Or Animal - Falling Objects or Missiles:**

If damaged glass is repaired rather than replaced, no deductible will apply for such repair. This extension does not apply to Emergency Services Organizations and Governmental Entities.

ADDITIONAL TRANSPORTATION EXPENSES

SECTION III, A.4.a. - Transportation Expenses is deleted in its entirety and replaced with the following:

We will pay up to the maximum Limit of Insurance shown on the ElitePac Schedule for temporary transportation expenses that you incur because of any "loss" to a covered "auto", but only if the covered "auto" carries the coverages and meets the requirements described in **1.** or **2.** below:

1. We will pay temporary transportation expenses for total theft of a covered "auto". We will only pay for such expenses incurred during the period beginning 24 hours after the theft and ending, regardless of the policy's expiration, when the covered "auto" is returned to use or we pay for its "loss".
2. For "loss" other than total theft of a covered "auto" under Comprehensive or Specified Causes of Loss Coverage, or for any "loss" under Collision Coverage to a covered "auto", we will only pay for those temporary transportation expenses incurred during the policy period beginning 24 hours after the "loss" and ending, regardless of the policy's expiration, with the lesser of the number of days reasonably required to repair or replace the covered "auto" or 30 days.

   Paragraph **2.** of this extension does not apply while there are spare or reserve "autos" available to you for your operations.

This coverage extension does not apply to Emergency Services Organizations, Governmental Entities and Schools.

HIRED AUTO PHYSICAL DAMAGE COVERAGE

The following is added to **SECTION III, A.4. - Coverage Extensions:**

Physical Damage coverage is hereby extended to apply to Physical Damage "loss" to "autos" leased, hired, rented or borrowed without a driver. We will provide coverage equal to the broadest coverage available to any covered "auto" shown in the Declarations. But, the most we will pay for "loss" to each "auto" under this coverage extension is the lesser of:

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1. The Limit of Insurance stated in the ElitePac Schedule; or
2. The actual cash value of the damaged or stolen property as of the time of the "loss"; or
3. The actual cost of repairing or replacing the damaged or stolen property with other property of like kind and quality. A part is of like kind and quality when it is of equal or better condition than the pre-accident part. We will use the original equipment from the manufacturer when:
   (a) The operational safety of the vehicle might otherwise be impaired;
   (b) Reasonable and diligent efforts to locate the appropriate rebuilt, aftermarket or used part have been unsuccessful; or
   (c) A new original equipment part of like kind and quality is available and will result in the lowest overall repair cost.

For each leased, hired, rented or borrowed "auto" our obligation to pay "losses" will be reduced by a deductible equal to the highest deductible applicable to any owned "auto" for that coverage. No deductible will be applied to "losses" caused by fire or lightning.

HIRED AUTO LOSS OF USE COVERAGE

The following is added to **SECTION III, A.4. - Coverage Extensions:**

We will pay expenses for which you are legally responsible to pay up to the Limit of Insurance shown on the ElitePac Schedule per "accident" for loss of use of a leased, hired, rented or borrowed "auto" if it results from an "accident".

This coverage extension does not apply to Schools.

AUTO LOAN/LEASE GAP COVERAGE (Not Applicable in New York)

The following is added to **SECTION III, A.4. - Coverage Extensions:**

In the event of a total "loss" to a covered "auto" we will pay any unpaid amount due on the lease or loan for a covered "auto", less:

1. The amount paid under the Physical Damage Coverage Section of the policy; and
2. Any:
   a. Overdue lease/loan payments at the time of "loss";
   b. Financial penalties imposed under a lease for excessive use, abnormal wear and tear, high mileage or similar charges;
   c. Security deposits not refunded by the lessor or financial institution;
   d. Costs for extended warranties, credit life, health, accident, or disability insurance purchased with the loan or lease; and
   e. Carry-over balances from previous leases or loans.

You are responsible for the deductible applicable to the "loss" for the covered "auto".

PERSONAL EFFECTS

The following is added to **SECTION III, A.4. - Coverage Extensions:**

If this policy provides Comprehensive Coverage for a covered "auto" you own and that covered "auto" is stolen, we will pay up to the Limit of Insurance shown on the ElitePac Schedule, without application of a deductible, for lost personal effects that were in the covered "auto" at the time of theft. Personal effects do not include jewelry, tools, money, or securities. This coverage is excess over any other collectible insurance.

AIRBAG COVERAGE

The following is added to **SECTION III, B.3.a. - Exclusions:**

Mechanical breakdown does not include the accidental discharge of an airbag.

This coverage extension does not apply to Emergency Services Organizations and Governmental Entities.

EXPANDED AUDIO, VISUAL, AND DATA ELECTRONIC EQUIPMENT COVERAGE

SECTION III, B.4. - Exclusions

This exclusion does not apply to the following:

1. Global positioning systems;
2. "Telematic devices"; or
3. Electronic equipment that reproduces, receives or transmits audio, visual or data signals and accessories used with such equipment, provided such equipment is:
   a. Permanently installed in or upon the covered "auto" at the time of the "loss";
   b. Removable from a housing unit that is permanently installed in the covered "auto" at the time of the "loss";
   c. Designed to be solely operated by use of power from the "auto's" electrical system; or
   d. Designed to be used solely in or upon the covered "auto".

A deductible of $50 will apply to each covered "loss" of such equipment.

COMPREHENSIVE DEDUCTIBLE - LOCATION TRACKING DEVICE

The following is added to **SECTION III, D. - Deductible:**

Any Comprehensive Coverage Deductible shown in the Declarations higher than $50 is hereby reduced to $50 for "loss" caused by theft if the "auto" is equipped with an "auto" location tracking device and that device aided in the recovery of the "auto".

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PHYSICAL DAMAGE LIMIT OF INSURANCE

SECTION III, C. - Limit Of Insurance is deleted in its entirety and replaced with the following:

The most we will pay for a "loss" in any one "accident" is the lesser of:

1. The actual cash value of the damaged or stolen property as of the time of the "loss"; or
2. The cost of repairing or replacing the damaged or stolen property with other property of like kind and quality.

This coverage extension does not apply to Emergency Services Organizations and Governmental Entities.

AMENDMENTS TO SECTION IV - BUSINESS AUTO CONDITIONS

DUTIES IN THE EVENT OF ACCIDENT, CLAIM, SUIT OR LOSS

The following is added to **SECTION IV, A.2.a. - Duties In The Event Of Accident, Claim, Suit Or Loss:**

The notice requirements for reporting "accident" claim, "suit" or "loss" information to us, including provisions related to the subsequent investigation of such "accident", claim, "suit" or "loss" do not apply until the "accident", claim, "suit" or "loss" is known to:

1. You, if you are an individual;
2. A partner, if you are a partnership;
3. An executive officer or insurance manager, if you are a corporation;
4. Your members, managers or insurance manager, if you are a limited liability company;
5. Your elected or appointed officials, trustees, board members or your insurance manager, if you are an organization other than a partnership, joint venture or limited liability company.

But, this section does not amend the provisions relating to notification of police or protection or examination of the property that was subject to the "loss".

WAIVER OF SUBROGATION

SECTION IV, A.5. - Transfer Of Rights Of Recovery Against Others To Us is deleted in its entirety and replaced with the following:

We waive any right of recovery we may have against any person or organization because of payments we make for "bodily injury" or "property damage" resulting from the ownership, maintenance or use of a covered "auto" but only when you have assumed liability for such "bodily injury" or "property damage" in an "insured contract". In all other circumstances, if a person or organization to or for whom we make payment under this Coverage Form has rights to recover damages from another, those rights are transferred to us.

MULTIPLE DEDUCTIBLES

The following is added to **SECTION IV, A. - Loss Conditions:**

If a "loss" from one event involves two or more covered "autos" and coverage under Comprehensive, Collision, or Specified Causes of Loss applies, only the highest applicable deductible will be applied.

CONCEALMENT, MISREPRESENTATION OR FRAUD

The following is added to **SECTION IV, B.2. - Concealment, Misrepresentation Or Fraud:**

If you should unintentionally fail to disclose any existing hazards in your representations to us prior to the inception date of the policy or during the policy period in connection with any newly discovered hazards, we will not deny coverage under this Coverage Form based upon such failure.

SECTION IV, B. 5. Other Insurance Condition, Paragraph **5.b.** is deleted in its entirety and replaced by the following:

For Hired Auto Physical Damage Coverage, the following are deemed to be covered "autos'" you own:

1. Any covered "auto" you lease, hire, rent, or borrow; and
2. Any covered "auto" hired or rented by your "employee" under a contract or agreement in that "employee's" name, with your permission, while performing duties related to the conduct of your business.

However, any "auto" that is leased, hired, rented or borrowed with a driver is not a covered "auto".

This coverage extension does not apply to Emergency Services Organizations and Governmental Entities.

POLICY PERIOD, COVERAGE TERRITORY

SECTION IV, B.7. - Policy Period, Coverage Territory is deleted in its entirety and replaced with the following:

Under this Coverage Form, we cover "accidents" and "losses" occurring:

a. During the policy period shown in the Declarations; and

b. Within the "Coverage Territory".

We also cover "loss" to or "accidents" involving a covered "auto" while being transported between any of these places.

TWO OR MORE COVERAGE FORMS OR POLICIES ISSUED BY US - DEDUCTIBLES

The following is added to **SECTION IV, B.8. - Two Or More Coverage Forms Or Policies Issued By Us:**

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If a “loss” covered under this Coverage Part also involves a “loss” to other property resulting from the same occurrence of “loss” or damage that is covered under this policy or another policy issued by us or any member company of ours, only the highest applicable deductible will be applied.

A minimum deductible of $50 will apply to each covered “loss” unless it is a Collision “loss” for a “private passenger auto”. For a “private passenger auto”, a minimum deductible of $100 for Collision will apply to each “loss”.

AMENDMENTS TO SECTION V - DEFINITIONS

BODILY INJURY INCLUDING MENTAL ANGUISH (Not Applicable in New York)

The definition of bodily injury is deleted in its entirety and replaced by the following:

“Bodily injury” means bodily injury, sickness, or disease sustained by a person, including death resulting from any of these. “Bodily injury” includes mental anguish resulting from bodily injury, sickness or disease sustained by a person.

ADDITIONS TO SECTION V - DEFINITIONS

COVERAGE TERRITORY

“Coverage Territory” means:

1. The United States of America (including its territories and possessions), Canada and Puerto Rico; and

2. Anywhere in the world, except for any country or jurisdiction that is subject to trade or other economic sanction or embargo by the United States of America, if a covered “auto” is leased, hired, rented, or borrowed without a driver for a period of 30 days or less, and the insured’s responsibility to pay “damages” is determined in a “suit” on the merits in and under the substantive law of the United States of America (including its territories and possessions), Puerto Rico, or Canada, or in a settlement we agree to.

If we are prevented by law, or otherwise, from defending the “insured” in a “suit” brought in a location described in Paragraph **2.** above, the insured will conduct a defense of that “suit”. We will reimburse the “insured” for the reasonable and necessary expenses incurred for the defense of any such “suit” seeking damages to which this insurance applies, and that we would have paid had we been able to exercise our right and duty to defend.

EXTRA HEAVY TRUCK

“Extra Heavy Truck” means a truck with a gross vehicle weight rating of 45,001 pounds or more.

HEAVY TRUCK

“Heavy Truck” means a truck with a gross vehicle weight rating of 20,001 pounds to 45,000 pounds.

LIGHT TRUCK

“Light Truck” means a truck with a gross vehicle weight rating of 10,000 pounds or less.

MEDIUM TRUCK

“Medium Truck” means a truck with a gross vehicle weight rating of 10,001 pounds to 20,000 pounds.

PRIVATE PASSENGER AUTO

“Private Passenger Auto” means a four-wheel “auto” of the private passenger or station wagon type. A pickup, panel truck or van not used for business is included within the definition of a “private passenger auto”.

SOCIAL SERVICE VAN OR BUS

“Social Service Van or Bus” means a van or bus used by a government entity, civic, charitable or social service organization to provide transportation to clients incidental to the social services sponsored by the organization, including special trips and outings.

TELEMATIC DEVICE

“Telematic Device” includes devices designed for the collection and dissemination of data for the purpose of monitoring vehicle and/or driver performance. This includes Global Positioning System technology, wireless safety communications and automatic driving assistance systems, all integrated with computers and mobile communications technology in automotive navigation systems.

VOLUNTEER WORKER

“Volunteer worker” means a person who performs business duties for you, for no financial or other compensation.

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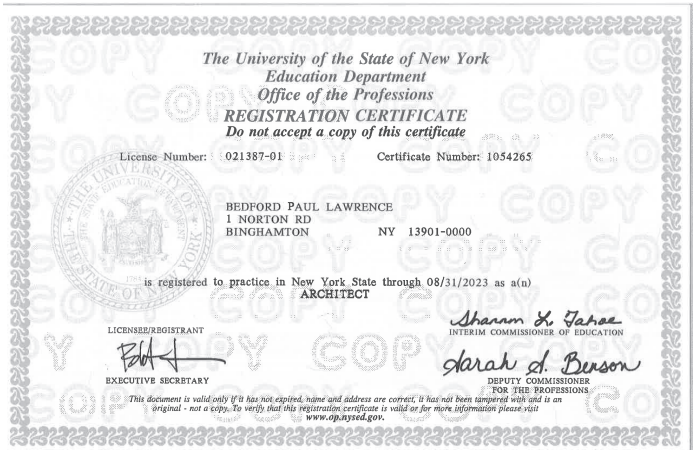


The University of the State of New York
Education Department
Office of the Professions
REGISTRATION CERTIFICATE
Do not accept a copy of this certificate

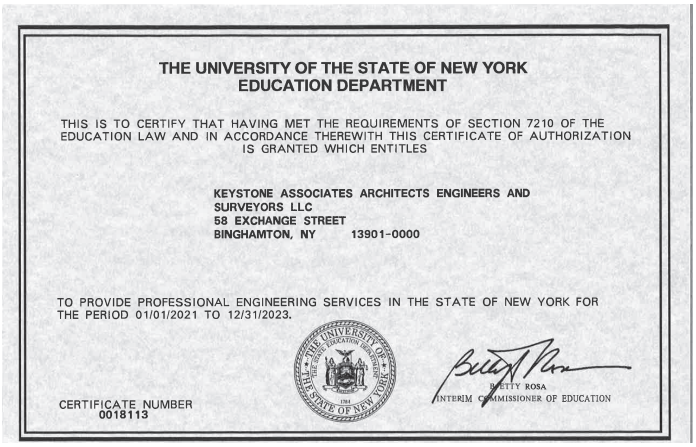
License Number: 021387-01 Certificate Number: 1054265

BEDFORD PAUL LAWRENCE
1 NORTON RD
BINGHAMTON NY 13901-0000

is registered to practice in New York State through 08/31/2023 as a(n)
ARCHITECT

LICENSEE/REGISTRANT
EXECUTIVE SECRETARY
INTERIM COMMISSIONER OF EDUCATION
DEPUTY COMMISSIONER FOR THE PROFESSIONS

This document is valid only if it has not expired, name and address are correct, it has not been tampered with and is an original - not a copy. To verify that this registration certificate is valid or for more information please visit www.op.nysed.gov.



THE UNIVERSITY OF THE STATE OF NEW YORK
EDUCATION DEPARTMENT

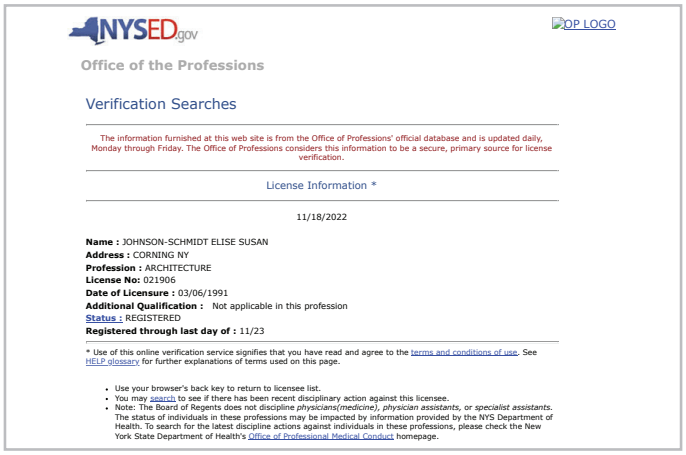
THIS IS TO CERTIFY THAT HAVING MET THE REQUIREMENTS OF SECTION 7210 OF THE EDUCATION LAW AND IN ACCORDANCE THEREWITH THIS CERTIFICATE OF AUTHORIZATION IS GRANTED WHICH ENTITLES

KEYSTONE ASSOCIATES ARCHITECTS ENGINEERS AND SURVEYORS LLC
58 EXCHANGE STREET
BINGHAMTON, NY 13901-0000

TO PROVIDE PROFESSIONAL ENGINEERING SERVICES IN THE STATE OF NEW YORK FOR THE PERIOD 01/01/2021 TO 12/31/2023.

CERTIFICATE NUMBER
0018113

BETTY ROSA
INTERIM COMMISSIONER OF EDUCATION



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Office of the Professions

Verification Searches

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License Information *

11/18/2022

Name : JOHNSON-SCHMIDT ELISE SUSAN
Address : CORNING NY
Profession : ARCHITECTURE
License No: 021906
Date of Licensure : 03/06/1991
Additional Qualification : Not applicable in this profession
Status : REGISTERED
Registered through last day of : 11/23

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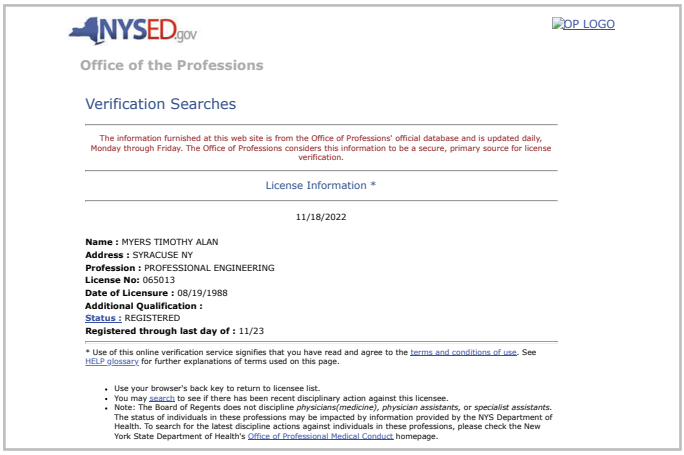
- Use your browser's back key to return to licensee list.
- You may search to see if there has been recent disciplinary action against this licensee.
- Note: The Board of Regents does not discipline *physicians(medicine), physician assistants, or specialist assistants.* The status of individuals in these professions may be impacted by information provided by the NYS Department of Health. To search for the latest discipline actions against individuals in these professions, please check the New York State Department of Health's Office of Professional Medical Conduct homepage.



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License Information *

11/18/2022

Name : MYERS TIMOTHY ALAN
Address : SYRACUSE NY
Profession : PROFESSIONAL ENGINEERING
License No: 065013
Date of Licensure : 08/19/1988
Additional Qualification :
Status : REGISTERED
Registered through last day of : 11/23

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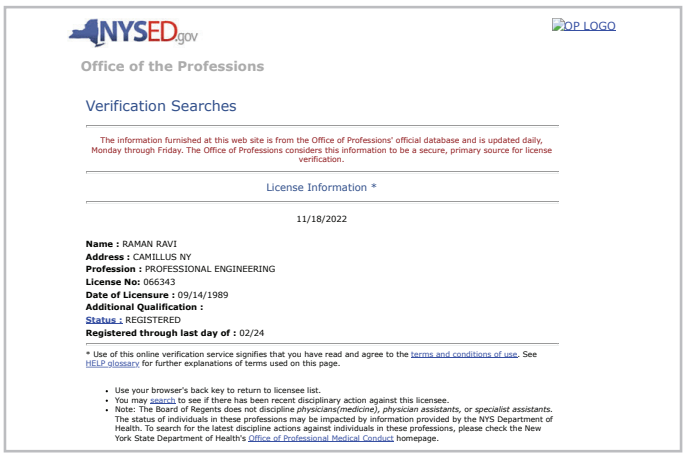

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License Information *

11/18/2022

Name : RAMAN RAVI
Address : CAMILLUS NY
Profession : PROFESSIONAL ENGINEERING
License No: 066343
Date of Licensure : 09/14/1989
Additional Qualification :
Status : REGISTERED
Registered through last day of : 02/24

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Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

080512000954

CERTIFICATE OF AMENDMENT OF
ARTICLES OF ORGANIZATION OF

KEYSTONE ASSOCIATES, ARCHITECTS, ENGINEERS, AND SURVEYORS, LLC

Under Section 211 of the Limited Liability Company Law.

FIRST: The name of the Limited Liability Company is Keystone Associates, Architects, Engineers, and Surveyors, LLC The original name, under which the company was formed, was Keystone Trozze, Architecture and Engineering, LLC.

SECOND: The original Articles of Organization were filed December 4, 1996. A prior Certificate of Amendment of Articles of Organization was filed July 6, 2000.

THIRD: The Amendments effected by this Certificate of Amendment are as follows:

a. Paragraph SIXTH of the Articles of Organization relating to the names and address of the members is hereby amended to read as follows:

SIXTH: The names and addresses of the members of the Limited Liability Company are:

Kenneth Duane Ellsworth (Licensed Engineer, License #066049)
128 Dodd Road
Windsor, NY 13865

Paul L. Bedford (Licensed Architect, License #021387)
100 Trim Street
Kirkwood, NY 13795

Kordian W. Wichtowski (Licensed Architect, License #013824)
3628 Pheasant Lane
Endwell, NY 13760

Rodney L. Carey (Licensed Land Surveyor, License #049642)
83 Willis Road
Binghamton, NY 13905

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Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

IN WITNESS WHEREOF, this Certificate has been subscribed this 13th day of March, 2008 by the undersigned authorized member who affirms that the statements made herein are true under the penalties of perjury.

Kenneth D. Ellsworth

Kenneth Duane Ellsworth, General Manager & Member
128 Dodd Road
Windsor, NY 13865

STATE OF NEW YORK)
) ss
COUNTY OF BROOME)

On the 13th day of March, 2008, the undersigned, a notary public in and for said State, personally appeared, KENNETH DUANE ELLSWORTH, personally known to me or proved to me on the basis of satisfactory evidence to be the individual whose name is subscribed to the within instrument and acknowledge to me that he executed the same in his capacity, and that by his signature on the instrument, the individual, or the person upon behalf of which the individual acted, executed the instrument.

Bonnie J. Zisko

Notary Public

BONNIE J. ZISKO
Notary Public, State of New York
No. 4747126
Residing in Tioga County
My Commission e[illegible] Mar. 30, 2011

Attachment: BID - City Court Relocation - Keystone - Proposal for Architectural-Engineering Services - Cortland County Courthouse Project

Reallocate Salary Grade
Director of Planning
Planning Department

WHEREAS, the Personnel/Civil Service Office has reviewed the salary grade for Director of Planning in the Planning Department, AND

WHEREAS, there has been a change to the job duties for this position as reflectecd in the job description, AND

WHEREAS, it is recommended that the aforesaid position be reallocated from Grade 5 ($79,412-105,698) to Grade 3 ($91,771-122,148) in the Management Compensation Plan, NOW, THEREFORE, BE IT

RESOLVED, that the position of Director of Planning is hereby reallocated from Grade 5 to Grade 3 effective January 26, 2023.

Attachment: Reallocate Director of Planning (11214 : Reallocate Salary Grade - Director of Planning)

Jurisdiction: Cortland County
Jurisdictional Class: Non-competitive
Adopted: 10/20/05
Amended: 4/26/21; 10/31/22; 1/26/23

DIRECTOR OF PLANNING

DISTINGUISHING FEATURES OF THE CLASS:

The work involves responsibility for planning, administering and supervising activities in the Office of Planning. The position involves responsibility for the oversight and coordination of a comprehensive planning program of a County by providing technical assistance to municipalities in areas such as land usage, business retention, and water resource management. The position also involves representing the County on a variety of planning related organizations and boards. The position oversees the Grant Administrator to aid County Departments and County municipalities with grants and shared services. Work is performed under the administrative direction of the County Administrator and the general direction of the County Legislature. Supervision is exercised over subordinate staff. Does related work as required.

TYPICAL WORK ACTIVITIES: (Illustrative only)

Serves as project manager in special and ongoing planning projects including land usage, business retention and water resource management;
Evaluates effectiveness of projects under development and issue instructions governing their progress;
Guides the preparation of feasibility studies and statistical analysis for planning reports, including supervision of consultant documents.
Recommends economic development projects for consideration by the Director and respective organizations (e.g. IDA, Legislature, etc.);
Participates in regional, state and federal planning activities/efforts, including review of new planning and environmental legislation (e.g. National Flood Insurance Program changes, sustainability planning).
Assesses infrastructure needs in the County, recommend solutions to resolve them and implement projects;
Applies for grant and loan funds to accomplish the mission of the Department;
Works with and is the liaison to other Economic and Development agencies in the County;
Prepares the departmental budget, the annual work plan and oversees the work of department employees;
Develops policies, procedures and programs for the County's community and economic development functions to enhance economic growth and activities consistent with the goals of the County;
Develops and implements programs in conjunction with the County Chamber of Commerce to retain, restore and expand the commercial and industrial tax base and attract new businesses to the area;
Represents the interests of the County in local, regional and State organizations;
Coordinates activities with surrounding counties and works with community and citizen groups to foster the development of an appropriate business climate;
Provides information and technical assistance in planning and development as requested by municipal officials, county departments, businesses and others;
Gathers statistics and completes reports;

Attachment: Director of Planning draft (11214 : Reallocate Salary Grade - Director of Planning)

May review and stamp plan sets for County departments if qualified.

FULL PERFORMANCE KNOWLEDGE, SKILLS, ABILITIES AND PERSONAL CHARACTERISTICS:

Thorough knowledge of the methods and techniques used in economic and community development, municipal planning and promotional activities;
Thorough knowledge of Federal and State programs related to the economic development and planning process;
Thorough knowledge of business and economic conditions of the county;
Good knowledge of Federal, State and Local laws and policies as they relate to economic development;
Good knowledge of the general principles, terminology and practices used in municipal and community planning;
Ability to plan and supervise the work of others;
Ability to prepare and deliver presentations in a clear, concise and articulate manner;
Ability to operate a personal computer and utilize common office software programs;
Ability to communicate effectively both orally and in writing;
Ability to establish and maintain effective working relationships with others;
Physical condition commensurate with demands of the position.

MINIMUM QUALIFICATIONS: Either:

(a) Possession of a Master's degree in planning, public administration, architecture, engineering, environmental studies or a closely related field and two (2) years of experience in planning or economic development; OR

(b) Possession of a Bachelor's degree or higher in planning, architecture, engineering, environmental studies or a closely related field and three (3) years of experience as defined in (a); OR

(c) An equivalent combination of training and experience as defined by the limits of (a), (b) and (c).

NOTE:

Degree must have been awarded by a college or university accredited by a regional, national, or specialized agency recognized as an accrediting agency by the U.S. Department of Education/U.S. Secretary of Education. If the degree was awarded by an educational institution outside of the United States and its territories, applicant must provide independent verification of equivalency. A list of acceptable companies who provide this service can be found at http://www.cs.ny.gov/jobseeker/cfm. Applicants must pay the required evaluation fee.

Attachment: Director of Planning draft (11214 : Reallocate Salary Grade - Director of Planning)

February 2023 Treasurer's Report

1. Trusts: (Funds Paid into Court)
Total Open Accounts: **1** in the process of being claimed & disbursed ***if / when*** court-ordered.

2. Open Estates:
I have been approved as Administrator of a **small** estate in which I collect and distribute estate assets to debtors. This is unique in that I, rather than an attorney, do the legal paperwork. I am currently awaiting receipt of an invoice from Cortland County Medicaid to satisfy the lien against the estate and close this legal action.

I'm currently holding **7** open mortgage foreclosure estates, **5** of which I am the Administrator. Auctions for mortgaged properties are arranged by a court appointed "Referee" (attorney) independent of our office. Surplus funds as a result of sale are considered "funds paid into court", transferred to the County Clerk for recording, then deposited with the Treasurer (**Trusts above**) until claimed and disbursed ***or*** deemed abandoned and transferred to the NYS Comptroller.

3. Delinquent Tax Foreclosure Auction: In November a list of potential foreclosure parcels was submitted to Phillips Lytle for title searches, which requires ~ 90 days. The Petition of Foreclosure will probably be filed at the County Clerk and mailed to property owners this month.

4. It's not 1990 anymore. The County Clerk and Sheriff's Office coordinated in requesting email addresses and phone #'s of persons posting bail. This saves time and money for the county and less money is sent to Albany due to funds being deemed "abandoned" when we can't locate claimants. In 2023 we have zero abandoned bail and unclaimed Surplus Mortgage Foreclosure funds to send to Albany. **I encourage all County entities to adopt the policy of requesting email addresses and phone #'s.**

5. Treasurer Office Budget (MUNIS)
January 2021 $37,277,104 Actual
January 2022 $37,978,573 Actual
January 2023 ~$40,059,928 Estimated

John T. Banewicz
County Treasurer

Attachment: February 2023 Treasurer Rpt (11275 : Treasurer Monthly Report)

CORTLAND COUNTY
REAL PROPERTY TAX SERVICES
60 CENTRAL AVENUE, ROOM 129
CORTLAND, NY 13045

Laura Fox
Director

Telephone: (607)753-5040
FAX: (607) 597-2064

January Activity Review:

- Processed 151 deeds for the month of December, including 10 property splits. This is the third highest monthly deed count in 11 years.
- Processed 1,490 deeds for the 2022 calendar year. This is the most deeds recorded by this office since we began record keeping.
- Assisted 13 individuals and businesses with purchasing a subscription to Image Mate online.
- Assisted 3 individuals with purchasing tax maps and surveys.
- Created 65 Sales Cards for local Realtors.
- Processed, printed, folded/stuffed 4,935 City of Cortland/County of Cortland tax bills and related paperwork for 2023 bill cycle.
- Highest sale price paid for real property in the month of December was $3,000,000 for 4 parcels covering Central Avenue, Elm Street, East Court Street and Dio Way. Purchased by Clearcort, LLC and is the former home of ALPLA/Voyant Beauty.
- Answered numerous phone calls relating to Real Property including an additional 39 regarding the Senior Exemption Letter.
- Sent out 13,221 Senior Citizen Exemption letters to Cortland County residents. As of January 31st, 96 letters have been returned undeliverable.

Attachment: January (11285 : Real Property Tax Services Monthly Report)

Sales Tax Comparison 2019-2022

Month Paid	2019	2020	2021	2022	21-22 Percent Change	Notes
Feb	2,347,915.73	2,527,694.45	2,258,824.28	2,890,974.39		2021 reduced by $182,540.86 distressed provider diversion (DPA);2022 reduced $45,993.78 DPA
Mar	1,971,860.68	2,023,553.45	2,134,812.37	2,506,604.04		
Apr	2,672,610.80	3,040,214.79	3,557,703.29	3,701,757.58		
Sub-Total 1st Quarter	**6,992,387.21**	**7,591,462.69**	**7,951,339.94**	**9,099,336.01**	**14.44%**	
May	2,339,124.76	1,715,716.22	2,597,211.08	3,204,653.96		Reduced in 2020, 2021 and 2022 by $28,450 AIM-related; 2021 reduced by $45,993.78 DPA
June	4,903,708.19	4,567,467.91	6,349,116.76	5,864,705.73		
July	773,418.54	854,932.41	944,284.48	677,238.89		
Sub-Total 2nd Quarter	**8,016,251.49**	**7,138,116.54**	**9,890,612.32**	**9,746,598.58**	**-1.46%**	
Sub-total To Date	**15,008,638.70**	**14,729,579.23**	**17,841,952.26**	**18,845,934.59**	**5.63%**	
Aug	2,517,792.90	2,181,049.57	2,830,208.14	3,119,971.73		2021 reduced by $45,993.78 DPA
Sept	2,523,666.90	1,685,890.60	2,733,986.37	3,054,568.40		
Oct	3,353,185.37	4,238,367.65	4,605,584.95	4,068,110.24		
Sub-Total 3rd Quarter	**8,394,645.17**	**8,105,307.82**	**10,169,779.46**	**10,242,650.37**	**0.72%**	
Sub-total To Date	**23,403,283.87**	**22,834,887.05**	**28,011,731.72**	**29,088,584.96**	**3.84%**	
Nov	2,331,110.53	2,250,005.02	2,595,126.56	2,911,614.03		2021 reduced by $45,993.78 DPA
Dec	4,547,980.16	5,130,908.25	5,767,289.89	6,117,946.06		Reduced in 2020 and 2021 by $151,805 AIM-related
Jan '20/ '21/ '22/'23	785,356.94	733,814.55	698,519.38	1,049,679.58		
Sub-Total 4th Quarter	**7,664,447.63**	**8,114,727.82**	**9,060,935.83**	**10,079,239.67**	**11.24%**	
Annual Totals	**31,067,731.50**	**30,949,614.87**	**37,072,667.55**	**39,167,824.63**	**5.65%**	

Attachment: 2019-2022 Sales Tax Comparison (11234 : 2022 Sales Tax Comparison & Debt Service)

County of Cortland
Statement of Indebtedness
For Calendar Year 2022

1st Year	Code	Description	Date of Issue	Date of Maturity	Interest Rate	Orig. Issue Amount	O/S Bal. Beg. Of Year	Principal Paid During Year	Interest Paid During Year	O/S Bal. End of Year
2015	Bond E	TC3 - $8.12 Bond	3/17/2015	3/1/2028	5.000%	$ 3,048,889	$ 1,976,982	$ 243,835	$ 76,946	$ 1,733,147
2015	Bond E	TC3 - $8.12 Bond	3/17/2015	3/1/2032	5.000%	$ 1,038,543	$ 795,000	$ 57,000	$ 28,429	$ 738,000
2015	Bond E	County Road Reconstruction - $8.12 Bond	3/17/2015	3/1/2028	5.000%	$ 746,801	$ 484,244	$ 59,726	$ 18,847	$ 424,518
2015	Bond E	Acquire Moveable Equipment - $8.12 Bond	3/17/2015	3/1/2028	5.000%	$ 50,002	$ 32,419	$ 3,997	$ 1,262	$ 28,422
2015	Bond E	Purchase DPW Equipment - $8.12 Bond	3/17/2015	3/1/2028	5.000%	$ 811,726	$ 526,341	$ 64,918	$ 20,486	$ 461,423
2015	Bond E	DPW - $8.12 Bond	3/17/2015	3/1/2032	5.000%	$ 691,457	$ 530,000	$ 38,000	$ 18,953	$ 492,000
2015	Bond E	Construct Recycling Center - $8.12 Bond	3/17/2015	3/1/2028	5.000%	$ 1,719,582	$ 1,115,014	$ 137,524	$ 43,397	$ 977,490
2015	Bond E	TC3 Master Plan	2/27/2015	9/1/2035	2.750%	$ 1,339,500	$ 1,012,000	$ 59,000	$ 29,738	$ 953,000
2015	Bond E	2013 Highways	2/27/2015	9/1/2035	2.750%	$ 169,000	$ 129,000	$ 7,000	$ 3,793	$ 122,000
2015	Bond E	2014 Highways	2/27/2015	9/1/2035	2.750%	$ 197,000	$ 149,000	$ 9,000	$ 4,380	$ 140,000
2015	Bond E	2013 Bridges	2/27/2015	9/1/2035	2.750%	$ 1,059,000	$ 802,000	$ 47,000	$ 23,570	$ 755,000
2015	Bond E	2014 Bridges	2/27/2015	9/1/2035	2.750%	$ 458,000	$ 349,000	$ 20,000	$ 10,258	$ 329,000
2015	Bond E	2015 Bridges	2/27/2015	9/1/2035	2.750%	$ 517,925	$ 392,000	$ 23,000	$ 11,520	$ 369,000
2015	Bond E	2013 Culverts	2/27/2015	9/1/2035	2.750%	$ 317,000	$ 242,000	$ 14,000	$ 7,115	$ 228,000
2015	Bond E	2014 Culverts	2/27/2015	9/1/2035	2.750%	$ 810,000	$ 613,000	$ 36,000	$ 18,013	$ 577,000
2015	Bond E	2015 Culverts	2/27/2015	9/1/2035	2.750%	$ 1,167,075	$ 883,000	$ 52,000	$ 25,948	$ 831,000
2015	Bond E	Little York Dam	2/27/2015	9/1/2035	2.750%	$ 1,417,500	$ 1,074,000	$ 63,000	$ 31,568	$ 1,011,000
2015	Bond E	2015 EFC Landfill	8/20/2015	3/1/2034	1.600%	$ 7,849,513	$ 5,315,000	$ 440,000	$ 152,870	$ 4,875,000
2017	Bond E	2016 Highways	6/29/2017	6/15/2023	2.000%	$ 1,365,000	$ 562,000	$ 279,000	$ 8,450	$ 283,000
2017	Bond E	2016 Bridges	6/29/2017	6/15/2023	2.000%	$ 50,000	$ 21,000	$ 10,000	$ 320	$ 11,000
2017	Bond E	2016 Culverts	6/29/2017	6/15/2023	2.000%	$ 30,000	$ 12,000	$ 6,000	$ 180	$ 6,000
2017	Bond E	Smart Watt Program	6/29/2017	6/15/2035	2.000%	$ 4,794,203	$ 4,115,000	$ 240,000	$ 103,488	$ 3,875,000
2020	Bond E	2012 E-911 Communications Bond Refunding	5/18/2020	8/15/2038	2.000%	$ 2,560,200	$ 2,437,800	$ 112,200	$ 70,890	$ 2,325,600
2020	Bond E	2012 Culverts Bond Refunding	5/18/2020	8/15/2038	2.000%	$ 1,204,800	$ 1,147,200	$ 52,800	$ 33,360	$ 1,094,400
2020	Bond E	2008 Landfill Cell Bond Refunding	4/30/2020	5/15/2032	2.000%	$ 760,000	$ 690,000	$ 55,000	$ 18,750	$ 635,000
TOTALS						**$ 34,172,716**	**$ 25,405,000**	**$ 2,130,000**	**$ 762,526**	**$ 23,275,000**

Attachment: 2022 Statement of Indebtedness (11234 : 2022 Sales Tax Comparison & Debt Service)

CALENDAR YEAR 2022

Municipalities	2022 TOTAL YEAR Sales Tax Receipts	County "Off the Top" Distribution	Advances Against Sales Tax (per Town Resolution)	Amount Disbursed to Municipality
Total County Apportionment	**$ 39,167,824.63**	**$ (1,500,000.00)**	**$ (670,000.00)**	**$ 36,997,824.63**
Distribution Detail				
Cortland County	$ 21,150,625.30	$ (810,000.00)		$ 20,340,625.30
City of Cortland	$ 6,952,288.87	$ (266,250.00)		$ 6,686,038.87
All Towns/Villages	$ 11,064,910.46	$ (423,750.00)	$ (670,000.00)	$ 9,971,160.46
Detail of Towns/Villages:				
Cincinnatus	$ 324,773.75	$ (12,437.78)	$ -	$ 312,335.98
Cortlandville	$ 3,473,758.27	$ (133,033.62)	$ -	$ 3,340,724.65
Cuyler	$ 295,878.45	$ (11,331.18)	$ (115,000.00)	$ 169,547.27
Freetown	$ 222,449.90	$ (8,519.11)	$ -	$ 213,930.79
Harford	$ 351,743.58	$ (13,470.63)	$ (70,000.00)	$ 268,272.95
Town Homer	$ 1,184,670.29	$ (45,369.01)	$ -	$ 1,139,301.28
Village Homer	$ 842,602.07	$ (32,268.91)	$ -	$ 810,333.15
Lapeer	$ 458,611.91	$ (17,563.34)	$ (310,000.00)	$ 131,048.57
Town Marathon	$ 351,557.70	$ (13,463.51)	$ -	$ 338,094.19
Village Marathon	$ 177,674.44	$ (6,804.35)	$ -	$ 170,870.09
Village McGraw	$ 154,317.34	$ (5,909.85)	$ -	$ 148,407.49
Preble	$ 603,597.70	$ (23,115.82)	$ -	$ 580,481.88
Scott	$ 358,066.20	$ (13,712.77)	$ -	$ 344,353.43
Solon	$ 330,909.68	$ (12,672.76)	$ -	$ 318,236.92
Taylor	$ 194,152.59	$ (7,435.41)	$ (20,000.00)	$ 166,717.18
Truxton	$ 427,343.76	$ (16,365.87)	$ (90,000.00)	$ 320,977.89
Virgil	$ 1,025,026.80	$ (39,255.19)	$ (65,000.00)	$ 920,771.62
Willet	$ 287,776.01	$ (11,020.88)	$ -	$ 276,755.13
Tot. Towns/Villages	**$ 11,064,910.46**	**$ (423,750.00)**	**$ (670,000.00)**	**$ 9,971,160.46**

Attachment: 2022 Sales Tax Distribution (11234 : 2022 Sales Tax Comparison & Debt Service)

Constitutional Tax Limit

Print/View Summary

County of Cortland (110100000000)

Fiscal Year Ending: 12/31/2023

Status: Certified

Tax Limit Form

Taxable Full Value

$2,934,548,791

Ad Valorem Tax Levy

Budget Adoption Date:

11/17/2022

Total County-Wide Ad Valorem Tax Levy:

$38,500,000

Credits

Prior Year Surplus Sales Tax:

$0

Sales Tax Credits to Reduce County Levy on Towns:

$725,000

Payments by Town to Reduce County Levy:

$0

Other Credits:

$0

Tax Levy Calculations

Total Credits	$725,000
Net Tax Levy	$37,775,000
Real Estate and Chargebacks from Schedule D	$156,315
Total Tax Levy	$37,931,315

Tax Limit Calculations

Fiscal Year	Taxable Full Value
2023	$2,934,548,791
2022	$2,684,991,669
2021	$2,569,874,790
2020	$2,543,368,551
2019	$2,388,872,857

Five Year Total Full Valuation	$13,121,656,658
Five Year Average Full Valuation	$2,624,331,332
Constitutional Tax Limit	$45,925,798
Total Tax Levy	$37,931,315
Total Exclusions	$2,476,683
Tax Levy Subject to Tax Limit	$35,454,632
Percentage of Tax Limit Exhausted	77.20%
Constitutional Tax Margin	$10,471,166

Attachment: 2023 Constitutional Tax Limit - Submitted (11234 : 2022 Sales Tax Comparison & Debt Service)

Debt Exclusions

Revenue Producing Improvement Debts	Principal	Interest	Total
Bonds			
Solid Waste - Landfill Debt	$505,000	$161,617	$666,617
Solid Waste - Recycling Debt	$144,264	$37,074	$181,338

Other Debt	Principal	Interest	Total
General Fund Bonds			
General Fund Debt - SmartWatt, TC3, E-911 Communications	$733,986	$286,937	$1,020,923
County Road Debt	$694,455	$180,118	$874,573
Road Machinery Debt	$112,295	$35,782	$148,077

Summary		
Revenue Producing Improvement Debt Total		$847,955
Revenues Designated for Such Debt Service from Schedule A	-	$1,356,628
Revenue Producing Improvement Debt Net Exclusions	=	$0
Other Debt Total	+	$2,043,573
Sub Total	=	$2,043,573
Revenues Designated by Law for Debt Service from Schedule B	-	$195,000
Debt Service Net Exclusions	=	$1,848,573
Object/Purpose with a Period of Probable Usefulness from Schedule C	+	$628,110
Other Exclusions	+	$0
Total Exclusions	=	**$2,476,683**

Schedules

Schedule A

Nature of Improvement	Total Estimated Revenue	Budgeted Costs for Operations	Amount Available for Payment of Principal and Interest
Excluded By Section 124.10			
Landfill operations cost exclusive of debt	$2,812,934	$1,456,306	$1,356,628
Recycling operation cost exclusive of debt	$110,670	$597,157	$0
		Total	**$1,356,628**

Schedule B

Budget Code	Revenue Description	Amount
A249747	Tompkins Cortland Community College debt repayment for joint community college (A249747.42270.TC07/TC12)	$195,000
	Total	**$195,000**

Schedule C

Budget Code	Applicable Paragraph Of Local Finance Law Sec.11.00	Object or Purpose	Amount
52060	Equipment, Machinery, Apparatus Or Furnishings	Capital Computer Equipment	$117,810
52015	Equipment, Machinery, Apparatus Or Furnishings	Department Specific Equipment	$238,100
A17115.54765	Judgements, Claims, Awards & Determinations	Judgements & Claims	$10,000
52005	Equipment, Machinery, Apparatus Or Furnishings	Capital Office Equipment	$206,200
52320	Parks, Playgrounds & Recreational Areas	Dwyer Park New Pavilion	$30,000
		Total	**$628,110**

Attachment: 2023 Constitutional Tax Limit - Submitted (11234 : 2022 Sales Tax Comparison & Debt Service)

52030	Machinery & Apparatus For Construction & Maintenance	Vehicle for Buildings and Grounds	$26,000
		Total	**$628,110**

Schedule D

Purpose	Amount
Chargebacks Subject To County Tax Limit	
Surplus/Deficit on Extension of Roll	$125,344
Errors and omissions on prior year tax rolls	$16,871
ORPS Chargeback through Real Property for required software	$14,100
Total	**$156,315**

Other Exclusions

No entries.

Form History

Date and Time	Status Change	User	Email
11/21/2022 2:58:35 PM	Certified	Andrea Herzog (ccfinance)	aherzog@cortland-co.org
11/03/2022 5:57:07 PM	Pre-Budget Data Submitted	Andrea Herzog (ccfinance)	aherzog@cortland-co.org
09/13/2022 9:39:14 AM	Open	Andrea Herzog (ccfinance)	aherzog@cortland-co.org
08/30/2022 11:13:19 AM	Not Started	Carolyn Eisenstadt (LGSAMAU16)	Ceisenstadt@osc.state.ny.us

Attachment: 2023 Constitutional Tax Limit - Submitted (11234 : 2022 Sales Tax Comparison & Debt Service)

Attachment: 2023 Constitutional Tax Limit - Submitted (11234 : 2022 Sales Tax Comparison & Debt Service)

COUNTY OF CORTLAND

ADOPTION OF LOCAL LAW AUTHORIZING REAL PROPERTY TAX EXEMPTION FOR VOLUNTEER FIREFIGHTERS AND VOLUNTEER AMBULANCE SERVICE WORKERS

BE IT ENACTED by the Legislature of the County of Cortland, New York, as follows:

Section 1. Purpose

The New York State Real Property Tax Law was amended by Chapter 670 of the Laws of 2022 by the addition of a new §466-a providing for an up to ten percent (10%) partial real property tax exemption of the assessed value of the primary residence owned by a qualified enrolled member of an incorporated volunteer fire company, fire department or incorporated volunteer ambulance service. The intent of this Local Law is to permit the partial real property tax exemption for such qualified enrolled members of said emergency services organizations for real property taxes imposed by the County.

Section 2. Authority

Pursuant to Chapter 670 of the Laws of 2022 effective December 9, 2022, the New York State Real Property Tax Law was amended by adding a new §466-a authorizing local governments including counties to enact by local law, ordinance or resolution such partial tax exemption for County real property taxes to qualified enrolled members of said emergency services organizations, following a public hearing.

Section 3. Grant of exemption

The primary residential real property located in the County that is owned by an enrolled member of an incorporated volunteer fire company, volunteer fire department or incorporated voluntary ambulance service that provides services within the County shall be exempt from taxation and assessments levied by the County to the extent of ten percent (10%) of the assessed value of such property, exclusive of special assessments, subject to the requirements set forth herein.

Section 4. Authority Having Jurisdiction

For purposes of this Local Law the "Authority Having Jurisdiction" shall mean:

A. In the case of a fire district, the Board of Fire Commissioners of the fire district;
B. In the case of a contract fire department in a fire protection district, the Town Board;
C. In the case of a village fire department the Village Board;
D. In the case of a city fire department, the city council;
E. In the case of an incorporated voluntary ambulance service, the Town Board.

SAMPLE

Attachment: Sample_County_Local_Law (11300 : Volunteer Emergency Worker Tax Exemption)

Section 5. Eligibility.

Such exemption shall not be granted unless:

A. The applicant resides in the Town which is served by such incorporated volunteer fire company, volunteer fire department or incorporated voluntary ambulance service of which the applicant is a qualified enrolled member;
B. the property is the primary residence of the applicant;
C. the property is used exclusively for residential purposes; provided, however, that if any portion of such property is not used exclusively for the applicant's residence but is used for other purposes, such portion shall be subject to taxation and the remaining portion only shall be entitled to the exemption provided by this Local Law; and
D. the applicant has been certified by the authority having jurisdiction for the incorporated volunteer fire company, fire department, or voluntary ambulance service as an enrolled member who has served such incorporated volunteer fire company, fire department, or voluntary ambulance service for more than two (2) years; and
E. the applicant must submit said certification from the authority having jurisdiction together with the tax exemption application.

Section 6. Grant of Lifetime Exemption.

Any enrolled member of an incorporated volunteer fire company, fire department or incorporated voluntary ambulance service who accrues more than twenty years of active service, and is so certified by the authority having jurisdiction for the incorporated volunteer fire company, fire department or incorporated voluntary ambulance service, shall be granted the ten percent (10%) exemption authorized by this Local Law for the remainder of his or her life as long as his or her primary residence is located within the county.

Section 7. Surviving, Un-Remarried Spousal Exemption for Volunteer Firefighters or Volunteer Ambulance Workers Killed in the Line of Duty.

The property tax exemption authorized by this Local Law and granted to an enrolled member of an incorporated volunteer fire company, fire department, or incorporated voluntary ambulance service shall, upon application, be continued to such deceased enrolled member's un-remarried spouse if such member is killed in the line of duty, provided that:

A. Such un-remarried spouse is certified by the authority having jurisdiction for the incorporated volunteer fire company, fire department, or incorporated voluntary ambulance service as an un-remarried spouse of such enrolled member who was killed in the line of duty;
B. such deceased volunteer had been an enrolled member for at least five (5) years; and
C. such deceased volunteer had been receiving the exemption prior to his or her death.

SAMPLE

Attachment: Sample_County_Local_Law (11300 : Volunteer Emergency Worker Tax Exemption)

Section 8. Surviving, Un-Remarried Spousal Exemption for Deceased Volunteer Firefighters or Volunteer Ambulance Workers with Twenty Years of Enrolled Member Service.

The property tax exemption authorized by this Local Law and granted to an enrolled member of an incorporated volunteer fire company, fire department, or incorporated voluntary ambulance service shall, upon application, be continued to such deceased enrolled member's un-remarried spouse, provided that:

A. Such un-remarried spouse is certified by the authority having jurisdiction for the incorporated volunteer fire company, fire department, or incorporated voluntary ambulance service as an un-remarried spouse of such enrolled member;
B. such deceased volunteer had been an enrolled member for at least twenty (20) years; and
C. such deceased volunteer and un-remarried spouse had been receiving the exemption for such property prior to the death of such volunteer.

Section 9. Application.

An application form for such exemption and a certification provided by the appropriate authority having jurisdiction shall be filed with the Assessor for the Town on or before the taxable status date of each year or as otherwise required as prescribed by New York State.

Section 10. No Diminution of Benefits.

No applicant who is a volunteer firefighter or volunteer ambulance worker who by reason of such status is receiving any benefit under the provisions of Article 4 of the state Real Property Tax Law on the effective date of this Local Law shall suffer any diminution of such benefit because of the provisions of this Local Law.

Section 11. Effective Date

This Local Law shall take effect immediately upon filing with the Secretary of State.

Section 12. Financial Implications to County

None. This Local Law will not result in a diminution of taxable receipts or otherwise alter the County's ability to levy taxes.

SAMPLE

Attachment: Sample_County_Local_Law (11300 : Volunteer Emergency Worker Tax Exemption)

NEW YORK STATE

Department of Taxation and Finance
Office of Real Property Tax Services

Application for Volunteer Firefighters/Ambulance Workers Exemption

RP-466-a-vol

(1/23)

File this form with your local assessor by the taxable status date. See instructions.
Do **not** file this form with the Office of Real Property Tax Services.

Name(s) of owner			
Mailing address of owner(s) *(number and street or PO Box)*		Location of property *(street address)*	
City, village, or post office State ZIP code		City, town, or village State ZIP code	
Daytime contact number	Evening contact number	School district	
Email address		Tax map number of section/block/lot: Property identification *(see tax bill or assessment roll)*	

Mark an ***X*** in the appropriate box.

1 Is the property your primary residence? ..... Yes ☐ No ☐

2 Name of the incorporated volunteer fire company, fire department, or incorporated volunteer ambulance service that you serve: _____

2a Have you been an enrolled member of this organization for at least five years? ..... Yes ☐ No ☐
If *No*, specify the number of years you have been enrolled as a member. _____

2b Do you reside in the city, town, or village served by this organization? ..... Yes ☐ No ☐

2c Are you an un-remarried spouse of a deceased enrolled member who served for at least five years and who was killed in the same line of duty? ..... Yes ☐ No ☐

2d Are you an un-remarried spouse of a member who is deceased and served for at least 20 years? ..... Yes ☐ No ☐

3 Have you been granted a lifetime exemption in any municipality within the county? ..... Yes ☐ No ☐
If *Yes*, which municipality? _____

4 Is any portion of the property used for purposes other than residential, such as farming, commercial, vacant land, or a professional office? ..... Yes ☐ No ☐
If *No*, skip to Certification.

4a What percentage of the property is **not** used for residential purposes? _____

4b Explain such use and describe the portion that is so used. _____

Certification

I (we), _____, hereby certify that the information on this application and any accompanying pages constitutes a true statement of facts.

Signature *(All owners must sign this application)*	**Phone number**	**Date**

Return this form to the **local assessor** by the taxable status date. *(See* Deadline *below.)*

Attachment: rp466a_vol_fill_in (11300 : Volunteer Emergency Worker Tax Exemption)

For Assessor's Use Only

Date application filed: _____

Action on application: Approved ☐ Denied ☐

Reason for denial *(if applicable)* : _____

Exemption applies to taxes levied by or for:

County _____ ☐ City _____ ☐ Town _____ ☐

Village _____ ☐ School _____ ☐ Fire _____ ☐

Assessor's name *(print)*	
Assessor's signature	Date

Instructions

Authorization for exemption

Real Property Tax Law § 466-a authorizes the governing body of a county, city, town, village, school district, fire district, or special district, to partially exempt up to 10% of the assessed value of the residence of a volunteer firefighter or ambulance worker. The exemption does not apply to special assessments.

An eligible city, village, town, school district, fire district, special district, or county may enact, after a public hearing, a local law, or a resolution in the case of a school district, to adopt the volunteer firefighters/ambulance workers exemption. Consult your assessor to ascertain whether the exemption is available locally.

Eligibility

Note: If you receive this exemption, you **cannot claim** a New York State income tax credit for the same volunteer service. However, if the property has multiple owners, the owner(s) whose volunteer service was not the basis of the exemption are eligible to claim that credit.

The exemption is available only to members of incorporated volunteer fire companies, fire departments, or incorporated ambulance services who have been certified as being enrolled members for a minimum of two to five years, depending on the policy. The municipality determines the procedure for certification.

At local option of the city, town, village, school district, fire district, special district, or county, an enrolled member who has accrued more than 20 years of active service may be granted the exemption for the remainder of their life, as long as the member's primary residence is located within such county.

At local option, the exemption may be continued or reinstated for the un-remarried spouse of an enrolled member killed in the line of duty who had been a member of the volunteer fire company, fire department, or volunteer ambulance service for at least five years and was receiving the exemption prior to their death.

At local option, the exemption may be continued or reinstated for the un-remarried spouse of an enrolled member who accrued at least 20 years of active service and was receiving the exemption prior to their death.

The exemption may be granted only to applicants who reside in the jurisdiction served by the fire company, fire department, or ambulance service. The exemption is only available for the applicant's primary residence and only to property (or the portion thereof) exclusively used for residential purposes.

Deadline

If one or more of your localities have opted to offer this exemption, you must file the application in the assessor's office on or before the appropriate taxable status date, which, in most towns, is March 1. Consult with your assessor to confirm the deadline for your municipality.

Once the exemption is granted, the exemption may continue for the authorized period provided that the eligibility requirements continue to be satisfied. It is not necessary to reapply after the initial year for the exemption for it to continue.

For further information, ask your local assessor. To find your local assessor's contact information, visit our website or your locality's website.

Attachment: rp466a_vol_fill_in (11300 : Volunteer Emergency Worker Tax Exemption)

CERTIFICATION
OF THE
AUTHORITY HAVING JURISDICTION (AHJ)
PURSUANT TO REAL PROPERTY TAX LAW §466-a(2)(d)

FOR AN INCORPORATED FIRE COMPANY, FIRE DEPARTMENT, OR
INCORPORATED VOLUNTARY AMBULANCE SERVICE

The _____ of the _____ of _____
(*Village Board, City Council, or other AHJ*) (*Village, City, other AHJ*) (*Name*)
as the authority having jurisdiction for

_____,
(*Name of Incorporated Fire Company/Department or Incorporated Voluntary Ambulance Svc.)*
an incorporated fire company, fire department or incorporated voluntary ambulance service certifies that:

_____
(*name of applicant/enrolled member*)

1. is an enrolled member of the named incorporated volunteer fire company, fire department or incorporated voluntary ambulance service;

2. has accrued more than two (2) years of service in the named incorporated volunteer fire company, fire department or incorporated voluntary ambulance service; and

3. has satisfied the minimum service requirements for participation as established by the authority having jurisdiction in order to qualify as an enrolled member in such incorporated volunteer fire company, fire department or incorporated voluntary ambulance service.

This Certification may be relied upon by the governing body or assessor of any city, village, town, school district, special district, fire district or county as evidence of the applicant's status as an enrolled member.

_____ BOARD/COUNCIL OF THE _____ OF _____

_____

, Village/City Clerk

Dated: _____, 20___

This Certification and Form **RP-466-a-vol** must be submitted together to Town Assessor by the Applicant in order for partial property tax exemption to be processed.

Attachment: FASNY-5-VILLAGE-CITY-OTHER-AHJ-CERTIFICATION-2-year-form- (11300 : Volunteer Emergency Worker Tax Exemption)

CERTIFICATION
OF THE
AUTHORITY HAVING JURISDICTION (AHJ) PURSUANT TO REAL PROPERTY TAX LAW §466-a(3)

FOR AN INCORPORATED FIRE COMPANY, FIRE DEPARTMENT, OR INCORPORATED VOLUNTARY AMBULANCE SERVICE

The _____ of the _____ of _____
(*Village Board, City Council, or other AHJ*) (*Village, City, other AHJ*) (*Name*)
as the authority having jurisdiction for

_____,
(*Name of Incorporated Fire Company/Department or Incorporated Voluntary Ambulance Svc.)*
an incorporated fire company, fire department or incorporated voluntary ambulance service certifies that:

_____
(*name of applicant/enrolled member*)

1. is an enrolled member of the named incorporated volunteer fire company, fire department or incorporated voluntary ambulance service;

2. has accrued twenty or more years of service in the named incorporated volunteer fire company, fire department or incorporated voluntary ambulance service; and

3. has satisfied the minimum service requirements for participation as established by the authority having jurisdiction in order to qualify as an enrolled member in such incorporated volunteer fire company, fire department or incorporated voluntary ambulance service.

This Certification may be relied upon by the governing body or assessor of any city, village, town, school district, special district, fire district or county as evidence of the applicant's status as an enrolled member.

_____ BOARD/COUNCIL OF THE _____ OF _____

_____

, Village/City Clerk

Dated: _____, 20___

This Certification and Form **RP-466-a-vol** must be submitted together to Town Assessor by the Applicant in order for partial property tax exemption to be processed.

Attachment: FASNY-6-VILLAGE-CITY-Other-AHJ-CERTIFICATION-20-year-form- (11300 : Volunteer Emergency Worker Tax Exemption)

CERTIFICATION
OF THE
AUTHORITY HAVING JURISDICTION (AHJ)
PURSUANT TO REAL PROPERTY TAX LAW §466-a(5)

FOR AN INCORPORATED FIRE COMPANY, FIRE DEPARTMENT, OR
INCORPORATED VOLUNTARY AMBULANCE SERVICE

The _____as the authority having jurisdiction for
(*Fire District, Town\Village Board \City Council, or other AHJ*)

_____, an incorporated
(*Name of Incorporated Fire Company/Department or Incorporated Voluntary Ambulance Svc.)*
fire company, fire department or incorporated voluntary ambulance service certifies that:

_____
(name of applicant)
is the un-remarried spouse of:

_____
(named of deceased enrolled member)

1. who was an enrolled member of the named incorporated volunteer fire company, fire department or incorporated voluntary ambulance service for a period of at least twenty (20) years; and

2. who as an enrolled member was receiving the residential property tax exemption prior to his or her death.

The named applicant is qualified to continue the property tax exemption or have the pre-existing exemption reinstated as the qualifying, un-remarried spouse of a deceased enrolled member.

This Certification may be relied upon by the governing body or assessor of any city, village, town, school district, special district, fire district or county as evidence of the applicant's entitlement to the property tax exemption as the un-remarried spouse of a deceased enrolled member.

BOARD OF FIRE COMMISSIONERS ***or*** _____BOARD of the _____

_____ FIRE DISTRICT of_____

_____ _____
, Secretary ,Clerk

Dated: _____, 20__

This Certification and Form **RP-466-a-vol** must be submitted together to Town Assessor by the Applicant in order for partial property tax exemption to be processed.

Attachment: FASNY-7-AHJ-SURVIVING-SPOUSE-CERTIFICATION-20-year-form (11300 : Volunteer Emergency Worker Tax Exemption)

CERTIFICATION
OF THE
AUTHORITY HAVING JURISDICTION (AHJ)
PURSUANT TO REAL PROPERTY TAX LAW §466-a(4)

FOR AN INCORPORATED FIRE COMPANY, FIRE DEPARTMENT, OR
INCORPORATED VOLUNTARY AMBULANCE SERVICE

The _____as the authority having jurisdiction for
(*Fire District, Town\Village Board\City Council or other AHJ*)

_____, an incorporated
(*Name of Incorporated Fire Company/Department or Incorporated Voluntary Ambulance Svc.)*
fire company, fire department or incorporated voluntary ambulance service certifies that:

_____
(name of applicant)
is the un-remarried spouse of:

_____
(named of deceased enrolled member)

1. who was killed in the line of duty; and

2. who was an enrolled member of the named incorporated volunteer fire company, fire department or incorporated voluntary ambulance service for a period of at least five (5) years before his or her death; and

3. who as an enrolled member was receiving the residential property tax exemption prior to his or her death.

The named applicant is qualified to continue the property tax exemption or have the pre-existing exemption reinstated as the qualifying, un-remarried spouse of a deceased enrolled member killed in the line of duty.

This Certification may be relied upon by the governing body or assessor of any city, village, town, school district, special district, fire district or county as evidence of the applicant's entitlement to the property tax exemption as the un-remarried spouse of a deceased enrolled member.

BOARD OF FIRE COMMISSIONERS ***or*** TOWN\VILLAGE\CITY BOARD\COUNCIL

_____ FIRE DISTRICT of the _____ of_____

_____ _____
, Secretary ,Town\Village\City Clerk
Dated: _____, 20__

This Certification and Form **RP-466-a-vol** must <u>be submitted together</u> to Town Assessor by the Applicant in order for partial property tax exemption to be processed.

(LODD un-remarried Spouse Form) (Form FASNY-8 Rev 2023)

Attachment: FASNY-8-AHJ-LODD-SURVIVING-SPOUSE-CERTIFICATION-form- (11300 : Volunteer Emergency Worker Tax Exemption)

To be Submitted to Assessor by February 28 of Every Year

NOTIFICATION OF TERMINATION OF ENROLLED MEMBER STATUS BY THE AUTHORITY HAVING JURISDICTION (AHJ) FOR THE PERIOD FROM

MARCH 1, 20___ to FEBRUARY 28, 20___

(PURSUANT TO REAL PROPERTY TAX LAW §466-a(2)(d))

FOR AN INCORPORATED FIRE COMPANY, FIRE DEPARTMENT, OR INCORPORATED VOLUNTARY AMBULANCE SERVICE

The _____as the authority having jurisdiction for
(*Fire District, Town\Village\City Board, or other AHJ*)

_____, an
(*Name of Incorporated Fire Company/Department or Incorporated Voluntary Ambulance Svc.)*
incorporated fire company, fire department or incorporated voluntary ambulance service certifies that the individuals listed below:

1. terminated their affiliation with the AHJ between March 1, 20___ and the last day of February, 20____ *(last year)*
   (this year)
2. are no longer "enrolled members" of the above named incorporated fire company, fire department or incorporated voluntary ambulance service;

3. had not accrued at least twenty years of service as an enrolled member in the above named incorporated fire company, fire department or incorporated voluntary ambulance service at the time of their respective separation from service; and

4. no longer meet the certification criteria of the authority having jurisdiction for the partial real property tax exemption authorized under Real Property Tax Law Section 466-a; and

5. that this Notification may be relied upon by the governing body or assessor of any city, village, town, school district, special district, fire district or county as evidence of the termination of the below named individual's status as an enrolled member.

NAME AND ADDRESS

1) _____

2) _____

3) _____

4) _____

5) _____

Attachment: FASNY-9-AHJ-NOTIFICATION-OF-TERMINATION-of-enrolled-member-status-form (11300 : Volunteer Emergency Worker Tax

To be Completed by the Appropriate **Authority Having Jurisdiction**

TOWN\VILLAGE\CITY BOARD\COUNCIL
OF THE TOWN\VILLAGE\CITY OF _____

_____
, Clerk

Dated: _____, 20__

OR

BOARD OF FIRE COMMISSIONERS
_____ FIRE DISTRICT

_____
, Secretary

Dated: _____, 20__

OR

_____
(Name of Other Authority Having Jurisdiction)

_____
, Clerk\Secretary

Dated: _____, 20__

Attachment: FASNY-9-AHJ-NOTIFICATION-OF-TERMINATION-of-enrolled-member-status-form (11300 : Volunteer Emergency Worker Tax

Committee Discussion:

Rules of Order Article XII: 12.A.

Finance and Administration – A seven (7) member Committee shall review the tentative budget filed by the Budget Officer and shall consider and recommend appropriations required for all purposes and prepare and report the annual estimates for the tax levy.

The Committee shall oversee:

The Treasurer's Office, the Finance Office, Administration Office, Office of the Manager of Audit and Financial Projects, the Department of Real Property Tax Services, occupancy tax, Tompkins Cortland Community College (TC3), Industrial Development Agency and Business Development Corporation, and the agency that provides promotional and tourism service. The Finance and Administration Committee shall serve as the Audit Committee.

Agriculture/Planning/Environmental – Not less than five (5) nor more than seven (7) members who shall oversee:

County Planning Department, Soil and Water Conservation District, Cooperative Extension, public transportation, SPCA, and including but not limited to any associated agency.

Discussion topics:

Names in other counties:

- Economic Development and Planning Committee (Montgomery, Oswego County)
- Planning and Economic Development (Allegany, Cayuga, Chenango, Onondaga County)
- Economic Development, Planning, Tourism and Agriculture (Tioga County)
- Planning, Development and Environmental Quality (Tompkins County)
- Community Dev. & Natural Resources (Schuyler County)
- Planning, Development, Agriculture and Tourism (Seneca County)

Oversight statement examples

Seneca County: "Responsible for Planning & Community Development, Planning Board, Industrial Development Agency, Tourism, Federal and State grants, Soil & Water Conservation District, Extension Service, Agriculture Districts, and Finger Lakes Regional Airport."

Onondaga County: "Agricultural Districts, Office of Economic Development and Associated Boards, Division of Community Development, Information Technology, Onondaga County Industrial Development Agency, Onondaga County Civic Development Corporation, Trust for the Cultural Resources of Onondaga, County, Syracuse-Onondaga County Planning Agency, Central New York Regional Planning and Development Board, Greater Syracuse Property Development Corporation, Centerstate CEO, Cornell Cooperative Extension, Visit Syracuse."

Attachment: Committee Discussion (11288 : Possible Changes to APE Committee Name, Duties and Oversight)

Oswego County:

This committee shall deal with all matters pertaining to: County Departments - Promotion and Tourism, Department of Planning and Community Development

- Economic growth and industrial development of Oswego County, including all Federal and State grants pertaining to economic and industrial development and expansion and assistance for small businesses in Oswego County;
- The development and promotion of tourism in Oswego County, including administration of the state tourism matching funds program;
- The Tourism Advisory Council and serve as a liaison between the Council and the Legislature;
- Comprehensive planning, land use, zoning referrals, environmental management and assistance to local governments in Oswego County;
- The housing and Rental Assistance Programs;
- The transportation and Mass Transit Assistance programs;
- The County Planning Board and Regional Planning Board, and serve as liaison between the respective Boards and the Legislature;
- The development and promotion of agriculture, extension services, conservation, natural resources, wildlife and rural resources;
- The following agencies: Operation Oswego County; Industrial Development Agency; Small Business Extension Service; the Tourism Promotion and Development Agency; Central New York Regional Planning and Development Agency; Central New York Regional Transportation Authority and other transportation assistance programs; Environmental Management Council; Cooperative Extension, and Soil and Water Conservation District.

Attachment: Committee Discussion (11288 : Possible Changes to APE Committee Name, Duties and Oversight)

Municipalities' ARP Funds Allocation Usage

Municipality	Allocation
Cincinnatus Town	$ 103,179.17
Cortland City	$ 1,914,866.03
Cortlandville Town	$ 729,843.96
Cuyler Town	$ 93,948.44
Freetown Town	$ 78,666.43
Harford Town	$ 93,435.61
Homer Town	$ 318,870.84
Homer Village	$ 318,050.32
Lapeer Town	$ 74,563.88
Marathon Town	$ 101,640.72
Marathon Village	$ 88,409.99
McGraw Village	$ 99,999.69
Preble Town	$ 133,332.93
Scott Town	$ 115,384.27
Solon Town	$ 110,256.07
Taylor Town	$ 50,358.83
Truxton Town	$ 109,230.44
Virgil Town	$ 243,383.87
Willet Town	$ 102,666.35

City of Cortland –

DESCRIPTION OF USE	USED	DATE USED	CK NUM	GL CODING
RANDALL PARK; PLANNING	$ 21,122.43	MULT - ONGOING	MULT	A7140-541500
MAKE DEPARTMENT HEADS/MAYOR WHOLE (TOOK PAY CUT)	$ 20,858.00	12/10/2021	THRU PR	MULT DEPT'S 510000
COMPENSATION FOR EMPLOYEES THAT WORKED THROUGH PANDEMIC	$ 29,700.00	12/17/2021	THRU PR	MULT DEPT'S 510000
COMPUTER SERVERS/ACCESSORIES	$ 33,934.81	MULT - ONGOING		A1680-540500
FIRE DEPARTMENT VEHICLE	$ 40,000.00	5/3/2022	34880	A3410-520600
CODES VEHICLE	$ 41,840.00	5/3/2022	34880	A3620-540100
YOUTH BUREAU, BALLFIELD GROOMER	$ 17,396.53	8/3/2021	32446	A7110-520600
THREE POLICE DEPARTMENT PATROL VEHICLES	$ 128,897.10	8/2/2022	35861	A3120-520600
THREE POLICE DEPARTMENT PATROL VEHICLES	$ 15,000.00	9/21/2022	TBD	A3120-520600
VETERANS OF FOREIGN WARS	$ 5,000.00	12/28/2021	33877	A1325-541500
AMERICAN LEGION	$ 5,000.00	12/28/2021	33873	A1325-541500
DISABLED AMERICAN VETERANS	$ 5,000.00	12/28/2021	33878	A1325-541500
ELK'S LODGE	$ 5,000.00	12/28/2021	33876	A1325-541500
CORTLAND AREA COMMUNITIES THAT CARES	$ 2,000.00	12/28/2021	33874	A1325-541500
FAMILY AND CHILDREN COUNSELING SERVICES	$ 8,000.00	12/28/2021	33879	A1325-541500
CHILDCARE SERVICE PROVIDER	$ 40,000.00	12/28/2021	33875	A1325-541500
COURTHOUSE PARK TEMPORARY STAGE WORK	$ 388.98			
GRAND TOTAL	**$ 419,137.85**			

Cincinnatus – $50,000.00 to provide new sidewalks (sidewalks are completed.

Cortlandville – $60,000.00 Non Profit Grants

$51,901.00 Grant Match Linear Park

Attachment: ARP Usage by Municipalities (11246 : Municipal Use of American Rescue Plan Funding)

Cuyler –

Freetown – is looking into putting a permanent bathroom, replacing existing toys, and adding a walking track to the town park.

Harford –

Homer, Town of – nothing spent to date; in separate account. All are set aside for either a Bridge or to use to bring the Homer Police Dept. back to this building.

Homer, Village of –

Village of Homer						
ARPA Funds Allocation						
As of 08/15/2022						
Planned:						
		2021	**2022**	**Total**		
Total Funds		$ 159,025.10	$ 159,025.10	$ 318,050.20		
Lost revenue		(29,167.51)	-	(29,167.51)		
Thoma- CDBG		(6,750.00)		(6,750.00)	Total allocated/spent	
CIT Trainings		(4,847.18)		(4,847.18)	(128,077.89)	
Time off accruals		(17,158.55)		(17,158.55)		
Aquas signs		(892.67)		(892.67)		
Holiday Decorations		(19,000.00)		(19,000.00)		
Employee Bonuses		(11,100.00)		(11,100.00)		
Peace Trail		(7,500.00)	(7,500.00)	(15,000.00)		
Large Water Meters		(12,080.99)	(12,080.99)	(24,161.98)		
		$ 50,528.20	**$ 139,444.11**	**$ 189,972.31**		
		2021				
Lost Revenue		$ 34,365.50				
Less: DRI		(15,000.00)				
Less: DRI Drawings		(6,000.00)				

Attachment: ARP Usage by Municipalities (11246 : Municipal Use of American Rescue Plan Funding)

Less: DRI Siegel		(3,197.63)				
Less: Ebike with lights		(4,969.88)				
		$ 5,197.99				
Actual						
		2021	**2022**	**Total**		
Total Funds		$ 159,025.10	$ 159,025.10	$ 318,050.20		
Keystone DRI		(15,000.00)	-	(15,000.00)		
Aqua signs		(892.67)		(892.67)		
Victor Siegel Video		(3,197.63)		(3,197.63)		
DRI drawings		(6,000.00)		(6,000.00)		
CIT Trainings		(4,847.18)	-	(4,847.18)		
Ebike		(4,969.88)		(4,969.88)		
Time off accruals		(17,158.55)	-	(17,158.55)		
Employee Bonuses		(11,100.00)	-	(11,100.00)		
Peace Trail		-	-	-		
Large Water Meters		(12,080.99)	(12,080.99)	(24,161.98)	-	
		$ 83,778.20	**$ 146,944.11**	**$ 230,722.31**		
				(19,000.00)		
				(15,000.00)		
				(6,750.00)		
				$ 189,972.31		
	Amount already spent					
	Amount allocated and not spent					

Attachment: ARP Usage by Municipalities (11246 : Municipal Use of American Rescue Plan Funding)

Lapeer – Half has been used for oil and stone/blacktop in the highway department. The second half has not been used to date.

Marathon, Town of – the town of Marathon has not spent any ARP money. They are working on a list of possible needs and will be making a decision soon.

Marathon, Village of –

$21,135 was spent for the emergency purchase of two blower motors for the wastewater plant.

$55,000 is being allocated for an emergency stand-by generator which has been ordered by the Cortland County Health Department for our public water supply. We are in the process of drafting a request for proposal to purchase.

This leaves us with a balance of $12,275 which we are going to use to replace overhead doors and other necessary repairs to our DPW garage.

McGraw – Sewer project ($45,635 spent on electric panel work, $71,025 on pump and system service, $116,600 spent with W2 Operator for sewer project)

Preble – Has not expended any funds yet.

Scott – money will be used to help fund planning costs for Fuller Park bathroom grant and Stevens Bridge replacement. Also being used for playground equipment.

Solon –

Taylor –

Truxton – It will be used in its entirety for the slope failure on Morgan Hill Road.

Virgil –

Willet – The Town of Willet has not used any of the ARP funding as of yet.

Attachment: ARP Usage by Municipalities (11246 : Municipal Use of American Rescue Plan Funding)