



Town of Oyster Bay
Department of Planning and Development
Town Hall – 74 Audrey Avenue
Oyster Bay, New York 11771
(516) 624-6200
FAX (516) 624-6240
www.oysterbaytown.com

ELIZABETH L. MACCARONE
COMMISSIONER

TIMOTHY R. ZIKE
DEPUTY COMMISSIONER

September 11, 2020

**REQUEST FOR PROPOSALS (P&D 1-2020) – STENOGRAPHIC SERVICES
FOR THE ZONING BOARD OF APPEALS – CALENDAR YEAR 2021**

To Whom It May Concern:

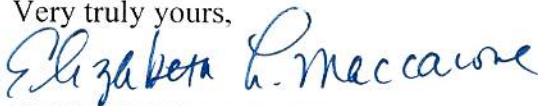
The Town of Oyster Bay Department of Planning and Development respectfully requests proposals from certified stenographic companies for a one (1) year agreement with the Town of Oyster Bay Zoning Board of Appeals, with an option, at the discretion of the Town, of extending the services to a second and a third reporting year, should it be mutually agreeable between the successful firm and the Town of Oyster Bay. Said services require attendance at approximately twenty-five (25) Zoning Board of Appeals meetings per year. The meetings convene on Thursday nights, beginning at 7:00 P.M. and attendance by a stenographer is required through the completion of the meeting, including executive sessions when votes are taken. Verbatim transcripts are to be supplied upon request.

Pricing and staffing plans should be proposed for each year of a possible three (3) year contract period. Responses should indicate, at a minimum, set fees for meeting appearances and per page costs of transcripts. Additionally, in accordance with the Town of Oyster Bay Ethics Code, the attached Disclosure Affidavit form needs to be submitted along with your response to demonstrate that there is no conflict of interest between your firm and any employees or other relationships/arrangements/agreements with the Town of Oyster Bay.

Responses are required to be received no later than 3:00 P.M. on Friday, October 2, 2020, and submitted to the following individual at the below noted address:

Elizabeth L. Maccarone, Commissioner
Department of Planning and Development
74 Audrey Avenue
Oyster Bay, New York 11771

If you have further questions regarding this Request for Proposal, please contact Susan Cloninger, Secretary to the Zoning Board of Appeals, directly at (516) 624-6229.

Very truly yours,

ELIZABETH L. MACCARONE
COMMISSIONER

ELM:tz

**TOWN OF OYSTER BAY
DISCLOSURE QUESTIONNAIRE**

All questions on this questionnaire must be answered by an officer and any stakeholders who hold a majority or greater ownership interest in the proposer. Answers must be typewritten or printed in ink. If you need more space to answer any question, make as many photocopies of the appropriate page(s) as necessary and attach them to the questionnaire.

COMPLETE THIS QUESTIONNAIRE CAREFULLY AND COMPLETELY. FAILURE TO SUBMIT A COMPLETE QUESTIONNAIRE MAY MEAN THAT YOUR BID OR PROPOSAL MAY BE REJECTED AS NON-RESPONSIVE AND IT MAY NOT BE CONSIDERED FOR AWARD

NOTE: All questions require a response, even if response is "none" or "not-applicable." No blanks.

SECTION I: GENERAL INFORMATION

1. Business name (legal name): _____
2. Federal Employer ID No. (FEIN): _____
3. d/b/a – doing business as (if applicable): _____
County filed: _____
4. Website address (if applicable): _____
5. Business e-mail address: _____
6. Principal place of business address: _____
7. Telephone number: _____ 7. Fax number: _____
8. Does the business use, or has it used in the past five (5) years, any other business name, FEIN, or d/b/a other than what is listed in questions 1-4 above? Yes ___ No ___
If yes, please provide details. _____

9. Authorized contact:
Name: _____
Title: _____
Telephone number: _____ Fax number: _____
E-mail: _____

10. How many years has this entity been in business? _____
11. The proposer is a (check one): Sole Proprietorship Partnership Corporation
 Other (Describe) _____

SECTION II: PRINCIPAL INFORMATION

1. Principal Name _____
 Date of birth ____/____/____ % Equity Interest in Company _____
 Home address _____
 City/state/zip _____
 Telephone _____

2. Positions held in submitting business

3. Within the past five years, have you been a principal owner or officer of any business or not-for-profit organization other than the one submitting the questionnaire?
 YES ___ NO ___; If Yes, provide details. _____

4. Has any governmental entity awarded any contracts to a business or organization listed in question 3 above in the past five (5) years while you were a principal owner or officer?
 YES ___ NO ___; If Yes, provide details. _____

SECTION III: DUE DILIGENCE QUESTIONS - TO BE COMPLETED IF CONTRACT VALUE IS \$25,000.00 OR OVER IN A 12 MONTH PERIOD.

1. Does the business possess all certifications, licenses, permits, approvals, insurance, bonds or other authorizations issued by any local, state, or federal governmental entity in connection with the proposal/project, business services, operations, business, or ability to conduct its activities? Please note this does not include construction related activities such as building permits and certificates of occupancy.
 YES ___ NO ___ If no, please provide details _____

2. Does this business have one or more affiliates, and/or is it a subsidiary of, or controlled by, any other business?
 YES ___ NO ___ If Yes, provide details. _____

3. Has the proposer ever had a bond or surety cancelled or forfeited, or a contract with any entity terminated? YES ___ NO ___ If Yes, state the name of bonding agency, (if a bond), date, amount of bond and reason for such cancellation or forfeiture; or details regarding the termination.
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4. On a separate document attached hereto, list all contracts that business has entered into with any municipality in the past three (3) years. Please list the names, address and contact person for the contracting entities.
5. Has the proposer, during the past five (5) years, been declared bankrupt? YES ___ NO ___ If Yes, state date, court jurisdiction, amount of liabilities and amount of assets _____
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6. In the past five years, has this business and/or any of its owners and/or officers and/or any affiliated business, been the subject of a criminal investigation and/or a civil anti-trust investigation by any federal, state or local prosecuting or investigative agency?
YES ___ NO ___ If Yes, provide details for each such investigation. _____
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7. In the past 5 years, have any owner and/or officer of any affiliated business been the subject of a criminal investigation and/or a civil anti-trust investigation by any federal, state or local prosecuting or investigative agency, where such investigation was related to activities performed at, for, or on behalf of an affiliated business.
YES ___ NO ___ If Yes, provide details for each such investigation. _____
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8. In the past 5 years, has this business and/or any of its owners and/or officers and/or any affiliated business been the subject of an investigation by any government agency, including but not limited to federal, state and local regulatory agencies?
YES ___ NO ___ If Yes, provide details for each such investigation. _____
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9. In the past 5 years, has any owner and/or officer of an affiliated business been the subject of an investigation by any government agency, including but not limited to federal, state and local regulatory agencies, for matters pertaining to that individual's position at or relationship to an affiliated business.
YES ___ NO ___ If Yes, provide details for each such investigation. _____
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10. Has any current or former director, owner or officer or managerial employee of this business had, either before or during such person's employment, or since such employment(if the conduct pertained to events that allegedly occurred during the time of employment):

a) Any felony charge pending? YES ___ NO ___ If Yes, provide details for each such charge.

b) Any misdemeanor charge pending? YES ___ NO ___ If Yes, provide details for each such charge. _____

c) Any violations of administrative, statutory or regulatory provisions pending?

YES ___ NO ___ If Yes, provide details for each such charge. _____

d) In the past ten (10) years, you been convicted, after trial or by plea, of any felony and/or any other crime, an element of which relates to truthfulness.? YES ___ NO ___ If Yes, provide details for each such conviction.

e) In the past ten (10) years, been convicted, after trial or by plea, of a misdemeanor?

YES ___ NO ___ If Yes, provide details for each such conviction. _____

f) In the past ten (10)years, been found in violation of any administrative, statutory, or regulatory provisions? YES ___ NO ___ If Yes, provide details for each such occurrence.

11. In the past five (5) years, has this business or any of its owners or officers, or any other affiliated business had any sanction imposed as a result of judicial or administrative proceedings with respect to any professional license held? YES ___ NO ___; If Yes, provide details for each such instance.

12. For the past five (5) tax years, has this business failed to file any required tax returns or failed to pay any applicable federal, state or local taxes or other assessed charges? YES ___ NO ___ If Yes, provide details for each such year. _____

SECTION IV: CONFLICT OF INTEREST

Please disclose any conflicts of interest as outlined below. NOTE: If no conflicts exist, please expressly state "No conflict exists."

1. Any material financial relationships that your firm or any firm employee has that may create a conflict of interest or the appearance of a conflict of interest in being awarded this contract with the Town of Oyster Bay.

2. Any family relationship that any employee of your firm has with any public servant that may create a conflict of interest or the appearance of a conflict of interest in being awarded this contract with the Town of Oyster Bay.

3. Any other matter that your firm believes may create a conflict of interest or the appearance of a conflict of interest in being awarded this contract with the Town of Oyster Bay.

CERTIFICATION

A MATERIALLY FALSE STATEMENT WILLFULLY OR FRAUDULENTLY MADE IN CONNECTION WITH THIS QUESTIONNAIRE MAY RESULT IN RENDERING THE SUBMITTING BUSINESS ENTITY NOT RESPONSIBLE WITH RESPECT TO THE PRESENT PROPOSAL OR FUTURE PROPOSALS, AND, IN ADDITION, MAY SUBJECT THE PERSON MAKING THE FALSE STATEMENT TO CRIMINAL CHARGES.

I, _____, being duly sworn, state that I have read and understand all the items contained in the foregoing pages of this questionnaire and the following pages of attachments; that I supplied full and complete answers to each item therein to the best of my knowledge, information and belief. The undersigned also certifies that s/he has not altered the content of the questions in the questionnaire in any manner; has read and understands all of the items contained in the questionnaire and any attached pages; has supplied full and complete responses to each item therein to the best of his/her knowledge, information and belief; is knowledgeable about the submitting business's business and operations; understands that the Town of Oyster Bay will rely on the information supplied in this questionnaire when entering into a contract or agreement with the business; and is under duty to notify the Town of Oyster Bay of any material changes to the business's responses herein

Sworn to before me this _____ day of _____ 20__

Notary Public

Name of submitting business: _____

By: _____

Print name

Signature

Title

_____/_____/_____
Date

SAMPLE LETTER
Please Use
Company Letterhead

Date _____

TOWN OF OYSTER BAY
Division of Purchase and Supply
74 Audrey Avenue
Oyster Bay, NY 11771

COMPANY NAME (must match your W9 form exactly) is hereby requesting to extend contract **BID PROPOSAL NUMBER AND TITLE** for another year, under the same terms, conditions and pricing as awarded in the current contract.

There is no change in the information on the Town of Oyster Bay Disclosure Questionnaire submitted with the original bid documents.

Federal Tax ID# _____

Sincerely,

(Signed by Principal/Officer of the Company)

CONTACT _____ TO SEND NOTICES
REGARDING FUTURE BIDS
E-MAIL ADDRESS _____