

CITY OF LOCKPORT
CORPORATION PROCEEDINGS

Lockport Municipal Building

Regular Meeting
Official Record

January 25, 2023
6:30 P.M.

Mayor Michelle M. Roman called the meeting to order.

ROLL CALL

The following Common Council members answered the roll call:

Aldermen Beakman, Swanson-Gellerson, Devine, Fogle, Kantor, and Lupo.

INVOCATION

MAYOR'S UPDATE

RECESS

Recess for public input.

012523.1

APPROVAL OF MINUTES

On motion of Alderman Beakman, seconded by Alderman _____, the minutes of the Regular Meeting of December 14, 2022 are hereby approved as printed in the Journal of Proceedings. Ayes _____. Carried.

FROM THE MAYOR

Resignations:

01/07/2023 Gina Pasceri, resigned as Alderman at Large effective January 9, 2023.

01/11/2023 Kristin Barnard, resigned as the 5th Ward Alderman effective January 10, 2023.

Appointments:

12/20/22 Wade M. Andes, 6644 Sheetram Road, Lockport, NY – appointed to Heavy Equipment Operator for the City of Lockport Highways and Parks Department effective January 1, 2023. Said appointment is permanent and subject to the City of Lockport Municipal Civil Service Rules and Regulations.

1/3/2023 Richard Clark, 289 Washington Street, Lockport, NY – appointed to the Building and Grounds Accessibility Committee effective January 1, 2023. Said term expires December 31, 2024.

1/20/2023 Lisa A. Swanson-Gellerson, 86 Roby Street, Lockport, NY - appointed to Alderwoman at Large to fill unexpired term of Gina Pasceri. Said term expires December 31, 2023.

1/20/2023 Margaret P. Lupo, 17 Bobolink Lane, Lockport, NY - appointed as 5th Ward Alderwoman to fill unexpired term of Kristin Barnard. Said term expires on December 31, 2023.

Commissioner of Deeds: For the term of two years expiring on December 31, 2024.

1. Paul M. Beakman, Jr., 104 Caledonia Street, Lockport, NY 14094
2. Benjamin Briskey, 120 Grant Street, Lockport, NY 14094
3. Marco Notaro, 5251 Bridgeman Road, Sanborn, NY 14132
4. Daryl Bodewes, 2462 Woodthrush Court, Niagara Falls, NY 14304
5. Colin Ligamarri, 4210 Washington Street, Niagara Falls, NY 14305
6. John Jacoby 4621 Lower River Road, Lewiston, NY 14092
7. Paul Drabinski, 1495 Abington Place, North Tonawanda, NY 14120
8. Maggie Lupo, 17 Boblink Lane, Lockport, NY 14094
9. Doug Mooradian, 6964 Lakeside Drive, Niagara Falls, NY 14304
10. Anita Mullane, 93 Lindhurst Drive, Lockport, NY 14094
11. Douglas C. Nicholson, 22 Roosevelt Drive, Lockport, NY 14094
12. Jeanann Page, 532 Irving Drive, Lewiston, NY 14092
13. David Keegan, 3772 McKoon Avenue, Niagara Falls, NY 14305
14. Michelle M. Roman, 30 Cherry Street, Lockport, NY 14094
15. William C. Rutland, 5798 Locust Street, Lockport, NY 14094
16. Carla L. Speranza, 6438 Lincoln Avenue, Lockport, NY 14094
17. Sarah Waechter, 4791 Oakridge Lane, Lewiston, NY 14092
18. Tom Reynolds, 739 E. Robinson Street, North Tonawanda, NY 14120
19. Steve Allore, 154 Locust Street, Apt 2, Lockport, NY 14094
20. Adam Dickey, 324 Ward Road, North Tonawanda, NY 14120

Received and filed.

FROM THE CITY CLERK

The Clerk submitted payrolls, bills for services and expenses, and reported that the Department Heads submitted reports of labor performed in their departments. Referred to the Finance Committee.

Communications (which have been referred to the appropriate City officials)

12/7/22 Vinny Cappadora, Happily Running – request permission to conduct their Beast of Burden event on January 28-29th and August 12th-13th, 2023 at Wide Waters Marina.

12/8/22 Brooke Chavanne, Director of Coaching of Soccer Shots Buffalo – request permission to use Altro Park for their upcoming 2023 season.

12/15/22 Ed Sandusky, Vice President of Optimist Club of Lockport – request permission to conduct the 47th annual Lockport Optimist Outdoor Arts & Crafts Festival on June 24th & 25th, 2023.

1/18/23 Sarah K. Lanzo, City Clerk – notification of bids received on January 17, 2023 in response to the **RFP for Emergency Medical Services Billing** are as follows:

Municipal Resources Inc.	\$150 per hour
Niagara Falls, NY	

1/18/23 Sarah K. Lanzo, City Clerk - notification of bids received on January 17, 2023 in response to the **RFP for Ambulance Consultation Services** are as follows:

AMB – Ambulance Medical Billing	7% / \$10 Per Medicaid Claim
Med Ex Billing Inc.	6% / \$15 Per Medicaid Claim

Referred to the Committee of the Whole.

Notice of Claim:

1/19/23 Karlene D. Pratt, 143 Waterman Street, Lockport, NY

MOTIONS & RESOLUTIONS

012523.2

By Alderman Beakman:

Resolved, that the Finance Committee has reviewed orders in favor of the claimants for payrolls, bills, and services to be paid on January 12 and 19, 2023 as follows:

2022 Expenses

General Fund	Fund A	\$227,542.01
Water Fund	Fund FX	\$39,253.72
Sewer Fund	Fund G	\$51,938.42
Capital Projects	Fund H	\$1,154,764.07
Refuse Fund	Fund CL	\$189.72
Self-Insurance	Fund MS	\$7,400.00
Community Devel.	Fund CD	\$36,700.00

2023 Expenses

General Fund	Fund A	\$51,070.02
Water Fund	Fund FX	\$3,068.73
Sewer Fund	Fund G	\$3,069.29

Payroll Pay Date 12/29 and 1/12: \$512,172.64

Seconded by Alderman _____ and adopted. Ayes _____.

012523.3

By Alderman Beakman:

Resolved, that the Mayor and Common Council do hereby extend congratulations and appreciation to the following City employees for their years of dedicated service to the City of Lockport:

<u>Employee</u>	<u>Years of Service</u>	<u>Title</u>
Clayton Dimmick	15	Director of Streets, Parks, & Water
Jason Dool	15	Chief Building Inspector

Ryan Magee	15	WWTP Operator
Jon Cavagnaro	5	HEO
Scott Sakellaris	5	Tree Trimmer
Christian Landry	5	Public Works Supervisor
Michele Gelnett	5	Senior Account Clerk

Seconded by Alderman _____ and adopted. Ayes _____.

012523.4

By Alderman _____:

Resolved, that pursuant to their request, Soccer Shots Buffalo is hereby granted permission to conduct a Spring, Summer and Fall Soccer Program on Saturday's at Altro Park beginning April 15, 2023 through November 11, 2023, subject to Soccer Shots Buffalo filing a certificate of insurance with the City Clerk naming the City of Lockport as additional insured.

Seconded by Alderman _____ and adopted. Ayes _____.

012523.5

By Alderman _____:

Resolved, that pursuant to their request, Happily Running, LLC is hereby granted permission to use the rest room facilities and pavilion at Nelson C. Goehle Wide Waters Marina on the weekends of January 28 and 29 and August 12 and 13, 2023, for the annual Winter and Summer Beast of Burden Ultra Marathons. Said permission is subject to Happily Running, LLC filing a certificate of insurance with the City Clerk naming the City of Lockport as additional insured, and be it further

Resolved, that the Director of Streets and Parks is hereby authorized and directed to arrange for the preparation of the restroom facilities for said event and to arrange for delivery of barricades to close off the parking lot, and be it further

Seconded by Alderman _____ and adopted. Ayes _____.

012523.6

By Alderman _____:

Resolved, that permission is hereby granted the Optimist Club of Lockport to conduct their 47th Annual Lockport Optimists Arts and Crafts Festival on June 24th and 25th, 2023 from 10:00 A.M. until 5:00 P.M. (street closing from 8:00 A.M. until 7:00 P.M.) with the following provisions:

- (1) The Lockport Optimist Club shall issue exhibitor's permits to arts and crafts exhibitors, vendors and peddlers, and to insure public safety and order and to avoid overcrowding of the exhibit areas, no other exhibits, displays, vendors or peddlers shall be permitted within the show area, whether located on public or private property, and the Lockport Optimist Club shall enforce this ban with the cooperation of the Lockport Police Department.
- (2) The Police Department is hereby directed to enforce the removal of all concessionaires, vendors, or peddlers from the show area not possessing an exhibitor's permit.

- (3) The show area shall include the blocks on Main Street from Washburn Street west to Saxton Street and Market Street from Main Street north to Chestnut Street.
- (4) The Lockport Optimist Club shall file a certificate of insurance with the City Clerk naming the City of Lockport as additional insured, subject to the approval of the Corporation Counsel, and be it further

Resolved, that the Director of Streets and Parks is hereby authorized and directed to arrange for delivery and pick-up of City barricades and trash receptacles as needed, and be it further

Resolved, that permission is granted the Optimist Club to use the Police Garage for storage of a golf cart overnight on Friday and Saturday night, June 24th and 25th subject to the approval of the Chief of Police, and be it further

Seconded by Alderman _____ and adopted. Ayes _____.

012523.7

By Alderman _____:

Resolved, that pursuant to their request, The Historic Palace, Inc. is hereby granted permission to conduct the Lockport 10 Open Road Race from 9am until 12:30pm on Saturday, February 12, 2023. The race route will require closing East Avenue between Elm and Charles Streets; closing Elm Street for the finish of the race; and, disrupting traffic flow on Market Street. Permission is granted subject to approval of the race route by the Police Chief and subject to The Historic Palace, Inc. filing a certificate of insurance with the City Clerk naming the City of Lockport as additional insured, and be it further

Resolved, that the Director of Streets and Parks is hereby authorized and directed to arrange for salting the streets in the City's portion of the race route if necessary, and to deliver barricades, cones, and "street closed" signs as required, and be it further

Resolved, that the Traffic Captain is hereby directed to arrange for police support for said event, and be it further

Seconded by Alderman _____ and adopted. Ayes _____.

012523.8

By Alderman _____:

Whereas, the City of Lockport is prepared to enter into a Payment In Lieu Of Tax agreement with OAHS Urban Park Housing Development Fund Corporation (hereinafter, "OAHS") pursuant to the Public Housing Finance Law regarding the property commonly known as Urban Park Tower; and

Whereas, the Project is located within the boundaries of the City of Lockport; and

Whereas, OAHS shall agree to make payments in lieu of Real Estate Taxes ("PILOT Payments") pursuant to the this Agreement with respect to the Project; and

Whereas, the PILOT Payments contemplated by this Agreement are in lieu of Real Estate Taxes which may be payable with respect to the Project during the term of this Agreement;

Now, therefore, in consideration of the matters above recited, for other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged by the parties, the Mayor is hereby directed and authorized to enter into the PILOT agreement with OAHS, subject to Corporation Counsel review.

- (1) The payments in lieu of taxes ("PILOT") period is to commence on January 1, 2024 (the Commencement Date), and be concurrent with the Project's use as apartment units for the community, but shall in no event exceed forty (40) years from the Commencement Date as authorized in the Public Housing Finance Law.
- (2) Beginning with the first fiscal year following the Commencement Date, and continuing through the fortieth (40th) fiscal tax year following, OAHS shall make annual payments in lieu of general real estate taxes on the property located at 77 Main Street, Lockport, commonly known as Urban Park Tower, in the amount of \$61,353.00 with a two percent (2%) annual escalation. Such payments shall be due and payable on January 1st of each year.
- (3) In the event of a default in payment of the PILOT agreement contemplated by this resolution, the City shall retain all rights afforded it under law and the PILOT Agreement.

Seconded by Alderman _____ and adopted. Ayes _____.

012523.9

By Alderman _____:

Resolved, that pursuant to their request, permission is hereby granted to Niagara Hospice to conduct the 10th Annual Hospice Gran Fondo Bike Ride, on Saturday, August 5th, 2023 beginning at 7 a.m., subject to approval of the race route by the Police Chief; and be it further

Resolved, permission include the barricading of West Jackson Street to through traffic, from Plank Road to Niagara Street, from 7am until 1pm; and be it further

Resolved, that the Director of Streets, Parks and Water Distribution is hereby authorized and directed to arrange for delivery of barricades, cones and 'street closed' signs as required; and be it further

Resolved, that Niagara Hospice send a letter to affected residents informing them of the race and the closure of West Jackson to through traffic; and be it further

Resolved, that Niagara Hospice file a certificate of insurance with the City Clerk naming the City of Lockport as additional insured.

Seconded by Alderman _____ and adopted. Ayes _____.

012523.10

By Alderman _____:

Whereas, in resolution 121922.2, the Common Council approved in-house ambulance services;

Whereas, said resolution included \$125,000 in FY 2023 funding for ambulance consultation services, to be primarily focused on the implementation of the first-year revenue cycle, third-party insurance contract negotiation, and other aspects of operations to make ambulance services as effective and efficient as possible;

Where the City distributed a Request for Proposals (RFP) and collected one bid from Municipal Resources Inc. for a fee of \$150 per hour;

Now therefore be it resolved that the Mayor is hereby authorized to enter into an agreement with Municipal Resources Inc for an annual cost not to exceed the budgeted allocation.

Seconded by Alderman _____ and adopted. Ayes _____.

012523.11

By Alderman _____:

Whereas, in resolution 121922.2, the Common Council approved in-house ambulance services;

Whereas, said resolution included \$53,219 in FY 2023 funding for emergency service billing service, which is a third party group that would assume billing responsibilities for the City's ambulance operations;

Where the City distributed a Request for Proposals (RFP) and collected two bids: MedEx Billing Inc for 6.8% of revenue / \$15 per Medicaid claim (estimated total of \$52,040 for the year) and Ambulance Medical Billing for either (1) 7% of revenue / \$10 per Medicaid claim (estimated total of \$49,234 for the year) or (2) \$19.50 per claim of any type (for an estimated annual total of \$44,226);

Where the City's Fire Chief and Director of Finance have reviewed the bids and recommends proceeding with MedEx Billing Inc. for their local expertise, professional experience, financial reporting capabilities, and recommendation from provided resources;

Now therefore be it resolved that the Mayor is hereby authorized to enter into an agreement with MedEx Billing Inc..

Seconded by Alderman _____ and adopted. Ayes _____.

012523.12

Whereas, 4th Generation Construction Inc., a contractor for the City's GIGP capital project, damaged a street clock located at 50 Main Street at an estimated damage of \$31,000;

Whereas, 4th Generation Construction Inc's insurance carrier, Wesco Insurance Co, has issued the City \$31,000 to cover the costs associated to this damage in claim number 3567192-1 with vendor "Essence of Time" on 6672 East Canal Road;

Now therefore be it resolved that the FY 2023 General Fund is hereby amended as follows:

Increase**Revenue**

A.0000.32680	Insurance Recoveries	\$31,000
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Expenditures

A.5182.54050	Equipment Maintenance and Repair	\$31,000
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Seconded by Alderman _____ and adopted. Ayes _____.

012523.13

By Alderman _____:

Resolved, that the Mayor and Common Council do hereby extend condolences to the family of Paul "Ollie" Oliver, a former laborer in the City of Lockport at Water Distribution, employed from 1972 – 1997, who recently passed away.

Seconded by Alderman _____ and adopted. Ayes _____.

012523.14

By Alderman _____:

Resolved, that the Mayor and Common Council do hereby extend condolences to the family of Chuck Sattler, a former Heavy Equipment Operator with the City of Lockport Water Department from 1981 – 2004, who recently passed away.

Seconded by Alderman _____ and adopted. Ayes _____.

012523.15

By Alderman _____:

Resolved, that the Mayor and Common Council do hereby extend condolences to the family of Wayne Carpenter, a former laborer with the City of Lockport Highways and Parks Department from 1972 – 1998, who recently passed away.

Seconded by Alderman _____ and adopted. Ayes _____.

012523.16

ADJOURNMENT

At _____ P.M. Alderman Beakman moved the Common Council be adjourned until 6:30 P.M., Wednesday, February 8, 2023.

Seconded by Alderman _____ and adopted. Ayes _____.

SARAH K. LANZO
City Clerk

CITY OF LOCKPORT
COMMON COUNCIL MEETING AGENDA
REGULAR MEETING
January 25, 2023
6:00 P.M.

6:00 P.M. Committee of the Whole Meeting

6:30 P.M. Common Council Meeting

ROLL CALL

APPROVAL OF MINUTES **Beakman:** Approve Common Council minutes of
012523.1 December 19, 2022

COMMUNICATIONS

**MOTIONS &
RESOLUTIONS**

Beakman: Review bills and payrolls
012523.2

Beakman: Congratulate employees for years of
012523.3 service

xxxx: Grant permission to Soccer Shots to
012523.4 conduct 2023 program at Altro Park

xxxx: Grant permission to Happily Running,
012523.5 LLC, to conduct 'Beast of Burden' Jan.
28-29 and Aug. 12-13 2023

xxxx: Grant permission to the Optimist Club
0012523.6 to conduct annual Arts & Crafts Festival
June 24th and 25th

xxxx: Grant permission to The Palace to conduct
012523.7 its 50th Lockport 10 road race on February 12th

xxxx: PILOT Urban Tower
012523.8

xxxx: Grant permission to Niagara Hospice for
012523.9 Gran Fondo bike ride August 5th

xxxx: Accept bid for the Emergency Medical
012523.10 Services Billing RFP

xxxx: Accept bid for Ambulance Consultation
012523.11 Services RFP

xxxx: Amend budget for insurance recoveries at 50
012523.12 Main Street



Office of the Mayor

Michelle M. Roman
MAYOR

LOCKPORT MUNICIPAL BUILDING
One Locks Plaza
Lockport, New York 14094
Phone (716) 439-6665
Fax (716) 439-6668

December 20, 2022

TO: Common Council

Under and by virtue of the authority conferred on me by the Charter of the City of Lockport, New York, I, Michelle M. Roman, Mayor of said City, do hereby appoint Wade M. Andes, 6644 Sheetram Road, Lockport, NY 14094 to Heavy Equipment Operator for the City of Lockport Highways and Parks Department effective January 1, 2023.

Said appointment is Permanent and subject to the City of Lockport Municipal Civil Services Rules and Regulations.

Witness by hand and the Seal of the City of Lockport this 20th day of December 2022.

Michelle M. Roman
Mayor

MMR/mal

cc: W. Andes
C. Dimmick
Civil Service



Office of the

LOCKPORT MUNICIPAL BUILDING
One Locks Plaza
Lockport, New York 14094
Phone (716) 439-6665
Fax (716) 439-6668

Michelle M. Roman
MAYOR

Mayor

January 3, 2023

To Common Council:

Under and by virtue of the authority conferred on me by the Charter of the City of Lockport, New York, I, Michelle M. Roman, Mayor of said City, do hereby appoint Richard Clark, 289 Washington Street, Lockport, NY 14094 to the Buildings and Grounds Accessibility Committee, effective January 1, 2023.

Said term expires on December 31, 2024.

Witness my hand and the seal of the City of Lockport, New York this 3rd day of January, 2023.

Sincerely,

Michelle M. Roman
Mayor

MMR/mal

Cc: R. Clark



Office of the Mayor

LOCKPORT MUNICIPAL BUILDING
One Locks Plaza
Lockport, New York 14094
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Fax (716) 439-6668

Michelle M. Roman, Mayor

January 1, 2023

To: The Common Council

Under and by virtue of the authority conferred on me by the Charter of the City of Lockport, New York, I, Michelle M. Roman, Mayor of said City, do hereby make the following appointments to the Commissioners of Deeds:

1. Paul M. Beakman, Jr., 104 Caledonia Street, Lockport, NY 14094
2. Benjamin Briskey, 120 Grant Street, Lockport, NY 14094
3. Marco Notaro, 5251 Bridgeman Road, Sanborn, NY 14132
4. Daryl Bodewes, 2462 Woodthrush Court, Niagara Falls, NY 14304
5. Colin Ligamarri, 4210 Washington Street, Niagara Falls, NY 14305
6. John Jacoby 4621 Lower River Road, Lewiston, NY 14092
7. Paul Drabinski, 1495 Abington Place, North Tonawanda, NY 14120
8. Maggie Lupo, 17 Boblink Lane, Lockport, NY 14094
9. Doug Mooradian, 6964 Lakeside Drive, Niagara Falls, NY 14304
10. Anita Mullane, 93 Lindhurst Drive, Lockport, NY 14094
11. Douglas C. Nicholson, 22 Roosevelt Drive, Lockport, NY 14094
12. Jeanann Page, 532 Irving Drive, Lewiston, NY 14092
13. David Keegan, 3772 McKoon Avenue, Niagara Falls, NY 14305
14. Michelle M. Roman, 30 Cherry Street, Lockport, NY 14094
15. William C. Rutland, 5798 Locust Street, Lockport, NY 14094
16. Carla L. Speranza, 6438 Lincoln Avenue, Lockport, NY 14094
17. Sarah Waechter, 4791 Oakridge Lane, Lewiston, NY 14092
18. Tom Reynolds, 739 E. Robinson Street, North Tonawanda, NY 14120
19. Steve Allore, 154 Locust Street, Apt 2, Lockport, NY 14094
20. Adam Dickey, 324 Ward Road, North Tonawanda, NY 14120

Said term expires on December 31, 2024.

Witness my hand and the seal of the City of Lockport, New York this ____ day of January 2023.

Sincerely,

Michelle M. Roman
Mayor

MMR/mal

Cc: P. Beakman
B. Briskey
M. Notaro
D. Bodewes
C. Ligamarri,
J. Jacoby
P. Drabinski,
M. Lupo
D. Mooradian
A. Mullane
D. Nicholson
J. Page
D. Keegan
M. Roman
W. Rutland
C. Speranza
S. Waechter
T. Reynolds
S. Allore,
A. Dickey



LOCKPORT MUNICIPAL BUILDING
One Locks Plaza
Lockport, New York 14094

Office of the

Phone (716) 439-6665
Fax (716) 439-6668

Michelle M. Roman
MAYOR

Mayor

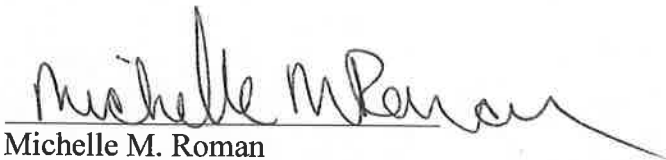
January 19, 2023

To Common Council:

Under and by virtue of the authority conferred on me by the Charter of the City of Lockport, New York, I, Michelle M. Roman, Mayor of said City, do hereby accept resignation from Gina N. Pasceri, 532 Pine Street, Lockport, NY 14094 from the Alderman At Large position effective January 9, 2023.

Witness my hand and the seal of the City of Lockport, New York this 19th day of January 2023.

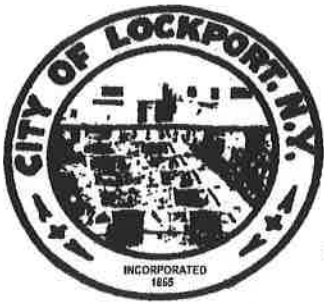
Sincerely,



Michelle M. Roman
Mayor

MMR/mal

Cc: G. Pasceri



LOCKPORT MUNICIPAL BUILDING

Office of the

One Locks Plaza
Lockport, New York 14094

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Fax (716) 439-6668

Michelle M. Roman
MAYOR

Mayor

January 19, 2023

To Common Council:

Under and by virtue of the authority conferred on me by the Charter of the City of Lockport, New York, I, Michelle M. Roman, Mayor of said City, do hereby accept resignation from Kristin L. Barnard, 36 Bonner Drive, Lockport, NY 14094 from the 5th Ward Alderman position effective January 10, 2023.

Witness my hand and the seal of the City of Lockport, New York this 19th day of January 2023.

Sincerely,

Michelle M. Roman
Mayor

MMR/mal

Cc: K. Barnard



Office of the

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Michelle M. Roman
MAYOR

Mayor

January 20, 2023

To Common Council:

Under and by virtue of the authority conferred on me by the Charter of the City of Lockport, New York, I, Michelle M. Roman, Mayor of said City, do hereby appoint Margaret P. Lupo, 17 Bob-o-link Lane, Lockport, NY 14094 to fill the unexpired term of Kristin Barnard for fifth ward Alderman effective January 20, 2023.

Said term expires on December 31, 2023.

Witness my hand and the seal of the City of Lockport, New York this 20th day of January 2023.

Sincerely,

Michelle M. Roman
Mayor

MMR/mal

Cc: M. Lupo



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Michelle M. Roman
MAYOR

Mayor

January 20, 2023

To Common Council:

Under and by virtue of the authority conferred on me by the Charter of the City of Lockport, New York, I, Michelle M. Roman, Mayor of said City, do hereby appoint Lisa A. Swanson-Gellerson, 86 Roby Street, Lockport, NY 14094 to fill the unexpired term of Gina Pasceri for Alderman At Large effective January 20, 2023.

Said term expires on December 31, 2023.

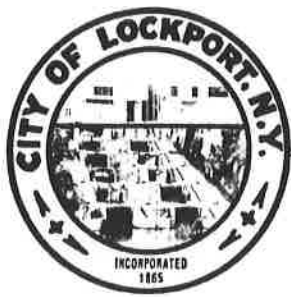
Witness my hand and the seal of the City of Lockport, New York this 20th day of January 2023.

Sincerely,

Michelle M. Roman
Mayor

MMR/mal

Cc: L. Swanson-Gellerson



CITY OF LOCKPORT, NEW YORK

LOCKPORT MUNICIPAL BUILDING

ONE LOCKS PLAZA

LOCKPORT, NY 14094

OFFICE OF CITY CLERK

Sarah K. Lanzo, City Clerk

Abbey Jo Polichette Dep. City Clerk/Registrar of Vital Statistics

Office (716)439-6676

Fax (716)439-6702

TO: Greater Niagara Newspapers
WLVL Radio
The Buffalo News
LCTV

FROM: Sarah K. Lanzo, City Clerk

DATE: January 9, 2023

RE: Municipal Building Closing - January

Please be advised the Lockport Municipal Offices will be closed on Monday, January 16, 2023 in observance of Martin Luther King Day.

There will be no change in the garbage pickup schedule.

cc: Mayor

claim

RECEIVED

JAN 19 2023

CITY CLERK OFFICE

TO: City of Lockport

FROM: Karlene D Pratt, 143 Waterman St Lockport NY 14094

DATE: 01/12/2023

Re: notice of defect

I am sending a letter addressing a notice of defect of a tree in front of 143 Waterman St.

I have included pictures of the damage.

I have sent letters regarding notice of defect for the same tree(s) causing damage dated 12/15/2018 and 12/31/2021.

Damage of this incident include gutter downspout, china glaze siding and electrical service line from top of house to meter box. Total dollar amount of electrical line and downspout repair is \$350.00. Please make check payable to Karlene D Pratt, 143 Waterman St, Lockport NY 14094.

I look forward to a speedy removal of this tree so that my house and neighbors' homes can avoid further damage and a safer neighborhood.

Thank you,

Karlene D Pratt

A handwritten signature in cursive script, appearing to read 'Karlene D Pratt', written in black ink.

City of Lockport

I HEREBY CERTIFY that the persons named in this payroll are employed solely in and have actually performed the duties of positions and employments indicated for the period ending

12/22/22, PAID on date 12/29/22
is approved at dollars, \$ 512,172.64

Mary Pat Albert

Pay Day Register

Pay Date Range 12/09/22 - 12/22/22

Pay Batch 2202226

Hours Description	Hours	Gross	Withholdings and Deductions	Gross Base	Benefits	Gross Base
207A Disability - 207A Disability	240.0000	3,158.00	Gross	512,172.64		
BERV - Bereavement	88.0000	1,902.97	Imputed Income		Workers' Comp	Gross Base
CMPE 1.0 - Comp Earned @ 1.0	365.8750	.00	Federal	57,428.12	Workers Compensation - General	25,348.44 402,107.69
CMPU - Comp Time Used	218.2500	7,427.08	FICA	30,944.36	Workers Compensation - Sewer	2,657.00 39,294.21
COVID - CORONA VIRUS HOUR	68.0000	1,776.09	Medicare	7,236.75	Workers Compensation - Water	2,558.60 40,969.76
EDAY - Extra Day	176.0000	6,267.28	New York State	23,938.52	Workers Compensation 50%	1,218.75 8,487.18
FHDB - Floating Holiday Buy Out	40.0000	1,952.70	457 % Deduction	4,953.27		
FHDU - Floating Holiday Used	908.0000	25,578.63	457 Flat Dollar Deduction	11,819.94		
FMLS - FMLA Sick Used	110.0000	4,326.00	AFLAC POSTTAX	161.33	Direct Deposits	31,782.19 Amount
HOL - Holiday	.0000	.00	AFLAC PRETAX	317.56	Alden State Bank	1,465.11
OOT - Out of Title	746.7500	28,654.35	ALLSTATE POSTTAX	760.74	Bancorp Bank	1,515.58
OOT OT 1.5 - Out of Title OT at	6.0000	223.53	ALLSTATE PRETAX	632.70	Bank of Akron	2,256.87
OT 1.0 - Overtime at Straight 1.0	35.7500	1,507.40	Child Support	375.00	Bank of America	6,860.18
OT 1.5 - Overtime @ 1.5	883.7500	36,606.72	Child Support - Maine	410.00	BANK OF AMERICA (2)	1,425.88
PRSU - Personal Used	277.0000	7,593.59	COLONIAL LIFE POSTTAX	55.40	BANK OF AMERICA (4)	1,125.17
REG - Regular	11,239.5000	324,230.99	FSA PRETAX	576.61	Bank on Buffalo	3,223.29
REG PT - Regular Part Time	233.5000	6,619.33	L&M LIFE	24.68	Chase	2,212.83
RET REF1 - Ret Refund Contrib &	.0000	8,384.03	NEW YORK LIFE	301.38	Chase Bank	1,300.00
RETRO - Retroactive Pay	.0000	1,746.12	RET ERS LOANS	1,860.00	Citizens Bank	12,154.31
RGS - Regular - Salary	70.0000	.00	RET PF SEC 414H ARREARS	71.30	Cornerstone Comm FCU	123,629.33
SAL - Salary	.0000	3,806.51	Retire ERS Tier 6 <= \$100,000	389.34	Evans Bank	3,094.21
SAL PT - Salary Part Time	.0000	1,865.37	Retire ERS Tier 6 <= \$45,000	1,896.20	Financial Trust FCU	2,277.55
SCKE - Sick Earned	10.0000	.00	Retire ERS Tier 6 <= \$45,000 OT	155.01	Five Star Bank	656.57
SCKU - Sick Used	418.0000	11,778.11	Retire ERS Tier 6 <= \$55,000	547.24	HSBC	1,375.52
STIP - Stipend	.0000	423.08	Retire ERS Tier 6 <= \$55,000 OT	44.13	Key Bank	28,062.35
VACU - Vacation Used.	958.5000	26,344.76	Retire ERS Tier 6 <= \$75,000	736.81	KEY BANK (2)	1,440.91
Total	17,092.8750	\$512,172.64	Retire ERS Tier 6 <= \$75,000	736.81	Key Bank (Formerly FNB)	14,828.28
			Retire PFRS <= \$55,000	1,302.31	Lockport School's FCU	1,512.26
			Retire PFRS Tier 6 <= \$100,000	1,041.16	M&T (MD, VA, WV, and DC)	284.08
			Retire PFRS Tier 6 <= \$75,000	1,205.68	M&T Bank	54,226.91
			Retire PFRS Tier 6 <=	90.52	Navy FCU	3,414.73
			Retire PFRS Tier 6 <= \$45,000	868.24	Niagara Regional FCU	2,019.59
			Retire PFRS Tier 6 <= \$55,000	136.50	Niagara's Choice FCU	42,856.68
			Retire PFRS Tier 6 > \$100,000	199.17	Northwest Bank	28,076.49
			Retire PFRS Tier 6 > \$100,000	63.60	Ontario Shores FCU	3,419.35
			Retire PFRS Tier 6 <= \$75,000 OT	40.77	USAA Federal Savings Bank	3,766.22
			Retire Tier 6 <= \$75,000 OT	139.42	Total	\$348,480.25
			Retire PFRS Tier 6 <= \$45,000	39.01		
			Union Dues - OPEIU	179.04	Check	\$10,821.38
			UNION DUES POLICE	1,547.72		
			Wage Garnishment - Flat \$ to	297.08		
			WAGE GARNISHMENT GROSS	84.40		
			Net	\$359,301.63		

City of Lockport

I HEREBY CERTIFY that the persons named in this payroll are employed solely in and have actually performed the duties of positions and employments indicated for the period ending

11/5/23, PAID on date 1/12/23
is approved at dollars, \$ 774,097.63

Mary Pat Gilbert

Pay Day Register

Pay Date Range 12/23/22 - 01/05/23

Pay Batch 1/12/23

Pay Batch 1/12/23 Total

Employees in Pay Batch 214

Female Employees in Pay Batch 53

Hours Description	Hours	Gross	Withholdings and Deductions	Gross Base	Benefits	Gross Base
207A Disability - 207A Disability	240.0000	3,158.00	Gross	774,097.63	Health Ins 298 Class 2 Family	25,134.09 .00
BERV - Bereavement	16.0000	453.28	Imputed Income		Health Ins 298 Class 2 Single	8,086.07 .00
CLAL - Clothing Allowance	.0000	44,850.00	Federal	89,958.26	Health Ins 298 Class 3 Family	85,173.85 .00
CMPE 1.0 - Comp Earned @ 1.0	76.5625	.00	FICA	47,403.18	Health Ins 298 Class 3 Single	8,122.60 .00
CMPE 1.5 - Comp Earned @ 1.5	1.0000	.00	Medicare	11,086.34	Health Ins 298 Class 4 Family	3,566.73 .00
CMPU - Comp Time Used	180.5000	5,919.58	New York State	36,334.70	Health Ins 298 Class 4 Single	1,217.83 .00
COVID - CORONA VIRUS HOUR	112.0000	3,782.33	457 % Deduction	5,420.05	Total	\$131,301.17
EDAY - Extra Day	160.0000	5,553.64	457 Flat Dollar Deduction	11,445.38		
FHDB - Floating Holiday Buy Out	1,320.0000	48,889.47	AFLAC POSTTAX	179.03	Workers' Comp	Gross Base
FHDE - Floating Holiday Earned	4,184.3600	.00	AFLAC PRETAX	374.62	Workers Compensation - General	21,512.40 405,481.03
FHDU - Floating Holiday Used	715.0000	21,660.81	ALLSTATE POSTTAX	760.74	Workers Compensation - Sewer	2,424.20 39,258.76
FLSA - FLSA	.0000	112.41	ALLSTATE PRETAX	632.70	Workers Compensation - Water	2,324.80 38,448.14
FMLP - FMLA Personal Used	32.0000	707.00	Child Support	375.00	Workers Compensation 50%	965.30 7,715.85
FMLS - FMLA Sick Used	128.0000	4,472.78	Child Support - Maine	410.00	Total	\$27,226.70
HOL - Holiday	2,291.0000	56,261.47	COLONIAL LIFE POSTTAX	55.40		
HOLIDAYPT - Holiday - Part Time	10.5000	226.10	FSA PRETAX	576.61	Direct Deposits	Amount
HOLW - Holiday Worked	128.0000	6,741.17	Health Ins 298 Class 2 Family	1,990.40	Alden State Bank	1,301.59
HOT 2.25 - Holiday Overtime 2.25	19.5000	1,827.39	Health Ins 298 Class 2 Single	760.84	Bancorp Bank	2,738.43
LONG - Longevity Payment	.0000	124,291.95	Health Ins 298 Class 3 Family	1,164.08	Bank of Akron	4,259.23
OOT - Out of Title	570.0000	23,102.15	Health Ins 298 Class 3 Single	500.15	Bank of America	7,808.70
OOT OT 1.5 - Out of Title OT at	24.5000	997.15	Health Ins 298 Class 4 Family	237.78	BANK OF AMERICA (2)	1,405.69
OT 1 SOE - Overtime at 1.0 State	4.0000	169.04	Health Ins 298 Class 4 Single	135.31	BANK OF AMERICA (4)	1,764.44
OT 1.0 - Overtime at Straight 1.0	25.0000	526.58	L&M LIFE	24.68	Bank on Buffalo	2,400.43
OT 1.5 - Overtime @ 1.5	2,059.5000	74,918.12	NEW YORK LIFE	301.38	Chase	2,229.95
OT 1.5 SOE - Overtime @ 1.5	212.7500	10,073.86	Pearl Insurance through CSEA	203.51	Chase Bank	1,239.21
PRSE - Personal Earned	3,761.5000	.00	RET ERS LOANS	1,860.00	Citizens Bank	19,377.82
PRSU - Personal Used	313.5000	9,806.52	RET PF SEC 414H ARREARS	21.39	Cornerstone Comm FCU	194,777.36
REG - Regular	8,958.1500	263,462.67	Retire ERS Tier 6 <= \$100,000	390.76	Evans Bank	4,461.38
REG PT - Regular Part Time	158.7500	5,495.62	Retire ERS Tier 6 <= \$45,000	1,986.41	Financial Trust FCU	1,824.74
RGS - Regular - Salary	70.0000	.00	Retire ERS Tier 6 <= \$45,000 OT	567.88	Five Star Bank	592.07
SAL - Salary	.0000	3,806.51	Retire ERS Tier 6 <= \$55,000	611.29	HSBC	1,127.40
SAL PT - Salary Part Time	.0000	1,865.37	Retire ERS Tier 6 <= \$55,000 OT	231.94	Key Bank	44,513.04
SCKE - Sick Earned	1,893.6250	.00	Retire ERS Tier 6 <= \$75,000	826.49	KEY BANK (2)	2,061.11
SCKU - Sick Used	239.0000	6,274.84	Retire PFRS <= \$55,000	1,516.24	Key Bank (Formerly FNB)	21,025.16
STIP - Stipend	.0000	1,048.08	Retire PFRS Tier 6 <= \$100,000	1,713.96	Lockport School's FCU	2,315.42
VACE - Vacation Earned	16,883.0075	.00	Retire PFRS Tier 6 <= \$75,000	1,534.24	M&T (MD, VA, WV, and DC)	284.07
VACU - Vacation Used	1,378.0000	43,643.74	Retire PFRS Tier 6 <=	168.61	M&T Bank	67,420.90
Total	46,165.7050	\$774,097.63	Retire PFRS Tier 6 <= \$45,000	877.66	Navy FCU	5,892.37
			Retire PFRS Tier 6 <= \$55,000	50.63	Niagara Regional FCU	2,084.77

2

apolichette@lockportny.gov

From: Kristin Schubring <kschubring@lockportny.gov>
Sent: Tuesday, January 10, 2023 3:00 PM
To: apolichette@lockportny.gov
Cc: cityclerk@lockportny.gov
Subject: AP Fund Totals 12/28/22 SPC RUN, 1/11/23

Hi Abbey,

Invoices to be approved at the meeting on 1/11/23 are as follows:

2022 Expenses

Fund A General - \$227,542.01 ✓
Fund CD Community Development - \$36,700.00
Fund CL Refuse & Recycling - \$189.72 ✓
Fund FX Water - \$39,253.72 ✓
Fund G Sewer - \$51,938.42 ✓
Fund MS Health Insurance - \$7,400.00 ✓
Fund H Capital Projects - \$1,154,764.07 ✓
Total - \$1,517,787.94

2023 Expenses

Fund A General - \$51,070.02
Fund FX Water - \$3,068.73
Fund G Sewer - \$3,069.29
Total - \$57,208.04



Kristin Bernardi Schubring
Principal Account Clerk
Finance Department
City of Lockport, NY
716.439.6620

From: Kristin Schubring <kschubring@lockportny.gov>
Sent: Tuesday, December 13, 2022 3:09 PM
To: 'apolichette@lockportny.gov' <apolichette@lockportny.gov>; 'cityclerk@lockportny.gov' <cityclerk@lockportny.gov>
Subject: AP Fund Totals 12/14/22

Hi Abbey,

Invoices to be approved at the meeting on 12/14/22 are as follows:

Fund A General - \$91,315.29
Fund CL Refuse & Recycling - \$101,805.91
Fund FX Water - \$47,371.87

January

Employee	Primary Department	Date	Years
1025 LaSpada, Thomas M	Public Works	01/08/1999	24
1029 Hunt, Jason P	Waste Water Department	01/15/2001	22
1034 Noon, Carol K	Waste Water Department	01/04/2002	21
1214 Orton, Drew	Fire Department	01/01/2003	20
1041 Tucker, Michael E	Public Works	01/10/2006	17
1193 Plunkett, Tina L	Police Department	01/06/2007	16
1069 Belling, Aaron K	Police Department	01/16/2007	16
1133 Snyder, Julie K	Police Department	01/19/2007	16
1207 Swan, Roxane S	Police Department	01/29/2007	16
1161 Dimmick, Clayton <i>Director of Streets</i>	Public Works	01/11/2008	15
1003 Dool, Jason C <i>Chief Bldg Inspector</i>	Building Inspection Department	01/11/2008	15
1048 Magee, Ryan D <i>WWTP Operator</i>	Waste Water Department	01/28/2008	15
1163 Brewer, Megan K	Building Inspection Department	01/02/2009	14
1141 Vosburgh, Tricia J	Police Department	01/23/2009	14
1204 Devine, Mark S	City Council	01/01/2016	7
1010 Mawhiney, Sue A	City Treasurer	01/01/2016	7
1056 Woods, Robert J	Public Works	01/03/2017	6
1165 Turner, Robert F	Finance Department	01/04/2017	6
1062 Cavagnaro, Jon P <i>HED</i>	Public Works	01/12/2018	5
1063 Sakellaris, Scott A <i>Tree Trimmer</i>	Public Works	01/18/2018	5
1064 Landry, Christian W <i>Public Works Supervisor</i>	Building Maintenance	01/22/2018	5
1170 Gelnett, Michele M <i>Sr Account Clerk</i>	Police Department	01/26/2018	5
1213 Cafarella, Jason J	City Attorney's Office	01/01/2019	4
1211 Lawson, Molly A	Mayor's Office	01/01/2019	4
1210 Roman, Michelle M	Mayor's Office	01/01/2019	4
1216 Heiman, Adam J	Public Works	01/31/2019	4
1316 Kantor, Luke D	City Council	01/01/2020	3
1315 Miskell Benedict, Laura M	City Attorney's Office	01/01/2020	3
1209 Van de Mark, Kelly	City Council	01/01/2020	3
1314 MacKenzie, Aaron C	Fire Department	01/06/2020	3
1318 Saunders, Jason R	Water Filtration	01/24/2020	3
1463 Barnard, Kristin L	City Council	01/01/2022	1
1461 Fogle, Kathryn J	City Council	01/01/2022	1
1462 Pasceri, Gina N	City Council	01/01/2022	1
1466 Wojewoda, Daniel J	Building Inspection Department	01/21/2022	1
1465 Bixler, Gloria S	Police Department	01/24/2022	1

Total Employees 36



To Whom It May Concern,

My name is Brooke Chavanne and I am the current Director of Coaching at Soccer Shots Buffalo. I am writing for a request to run our youth soccer program at Altro/Willow Park located on 201 Willow Street Lockport, NY 14094 for our spring, summer, and fall seasons. We would like to run the following days:

Saturday Morning starting at 8:30am and ending at 11:00am

- *Starting 4/15/23 – 11/11/23*

Please let me know if this request has been approved or denied. Just to reflect, we would like to run out youth soccer program on every Saturday morning from 8:30am – 11:00am starting on 4/15/23 and ending on 11/11/23. I look forward to your response. Thank you.

-Brooke Chavanne

Director Of Coaching

Soccer Shots Buffalo



5

Happily Running
PO Box 4371
Ithaca NY 14852
races@happilyrunning.com
607-376-RACE



To Whom it may concern

We would like to request using Wide Waters marina area for use of Beast of Burden event on the following dates

January 28th - 29th
August 12th - 13th

Set up for both events would start around 6am on Saturday and end around 6pm on Sunday

Thank you
Vinny Cappadora
Happily Running

Beast of Burden
1/28-1/29 + 8/12-8/13

apolichette@lockportny.gov

From: Vinny Cappadora <vinny@happilyrunning.com>
Sent: Wednesday, December 7, 2022 4:37 PM
To: Paul Oates; Abbey Polichette
Subject: [EXTERNAL] [Possible SPAM] Beast of Burden Events
Attachments: CityOfLockport COI _ Summer 23.pdf; City Of Lockport COI Winter 23.pdf

Hey Paul and Abbey -

I've attached the COI for the 2023 events The dates are
WINTER Jan 28-29
SUMMER Aug 12-13

Please let me know if there's anything else you'll need from me.

--
Thanks,
Vinny Cappadora
HappilyRunning.com
o. 607.376.7223
m. 631.334.5024



6

RECEIVED

DEC 16 2022

CITY CLERK OFFICE

Dec. 15, 2022

City of Lockport
City Clerk's Office
One Locks Plaza
Lockport, NY 14094

Re: 47th Annual Lockport Optimist Outdoor Arts & Craft Festival


This letter is a request from the Optimist Club of Lockport for permission to hold their annual arts and craft show on Main Street (Saxton St. to Washburn St.) in Lockport June 24th & 25th 2023. The show will be open from 10:00 AM to 5:00pm. The streets will be blocked off 8:00AM each day to allow vendors time to set up their booths and remove their vehicles from the show area. We will open the street back up for thru traffic as soon as it is safe to do so. We would request that the area from Market St. north to Chestnut St. as well as the immediate show area be off limits for vendors not having a valid Lockport Outdoor Arts & Crafts show permit.

We are also asking for use of the city's trash barrels and wooden barricades. As we have in the past we would like permission to keep our golf cart at the police garage overnight Friday and Saturday. We will pick it up Saturday and Sunday mornings for use during the show.

The city will be named on an insurance binder for this event as done in the past. A copy will be given to the city clerks' office before the show.

Thank you for your consideration and continued support of this event. If there are any questions regarding the above please contact me at (716)434-2207.

Sincerely,



Ed Sandusky
43 Woodbury Dr.
Lockport, NY 14094

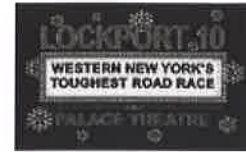
epsandusky@verizon.net





The Historic Palace, Inc.

PO Box 19 Lockport, New York 14095



Mayor of Lockport
Lockport, New York 14094

January 1, 2022

On Saturday, February 12, 2022 the Historic Palace Theatre will be holding the 50th Annual Lockport 10 Open Road Race. On behalf of the Palace, I am requesting permission from the City of Lockport to continue this strong tradition. The City will be named as an additional insured under the event's insurance provided by USA Track & Field.

In 2019 nearly 450 runners from all over Western New York, Southern Ontario and Pennsylvania finished the 10-mile, 5-mile, or two-person relay portion of the event. It is the second oldest race to be held annually in Western New York. All of the proceeds of this historic event went to the Palace Theatre to help all of its wonderful programs that benefit the greater Lockport Community.

We are requesting the city's support in providing barricades, cones, and police support in conducting a safe and successful event. We are also requesting permission to place two portable toilets in the parking lot of Widewater Marina for the runners convenience.

In addition, I would like to request the support of the Lockport Police Department and the Lockport Fire Department for traffic control during the race. The Niagara County Sheriff's Department and the New York State Police will be contacted to lend support for traffic control in addition to numerous volunteers to guide the runner safely along the course.

There will be a safety meeting with all support agencies on Wednesday, February 9 at 4:00PM at the Palace to cover logistics, event safety, and the race day timeline.

The race will be at 9:00AM on race day in front of the Palace. The runners will finish in front of the Palace. In the City the race course will travel out and back along Market Street. A course map is enclosed with this letter.

Traffic will need to be stopped on East Avenue between Elm and Charles Streets for the duration of the race (8:00AM - 12:00PM). Elm Street will need to be closed to traffic for the finish of the race. Traffic flow on Market Street will need to be disrupted to accommodate the runners. All traffic volunteers will be trained on proper procedures for conducting a safe event. From the start of the race to the time that the last finisher crosses the finish line is approximately two hours and 2:30 minutes. All closed roads will be opened to traffic as soon as possible.

The Mayor and all Common Council members are invited to either participate or join us for the ceremonial start of the race.

Sincerely,

Jeff Tracy, Race Director
716.622.9487
ScoreThisJeff@gmail.com

Insurance
needed

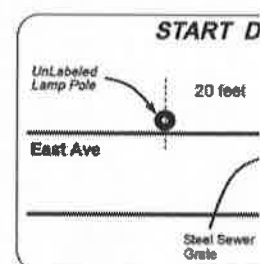
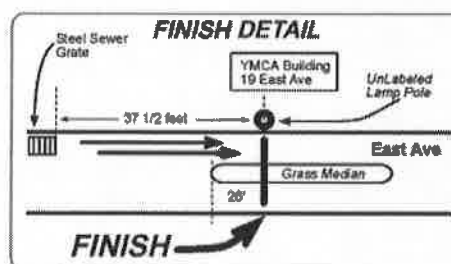
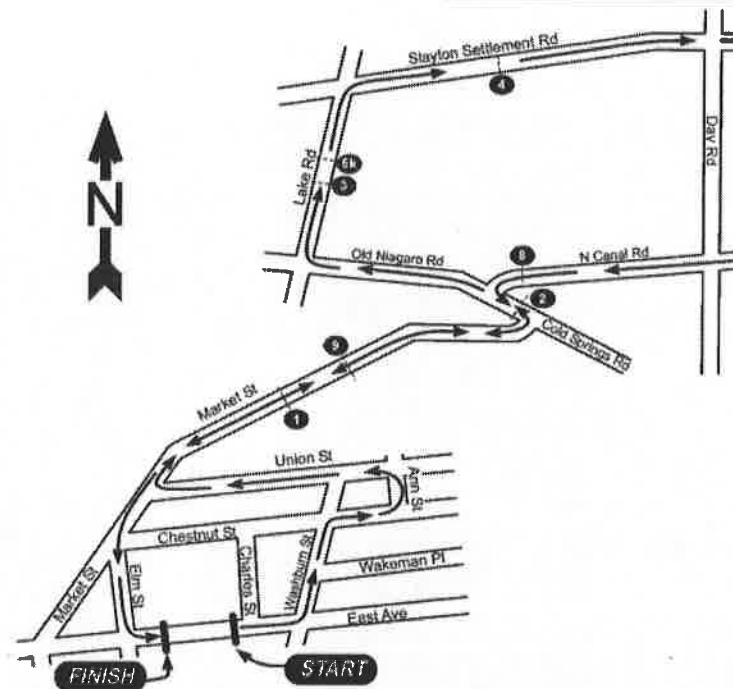
2/13/2015

USATF - Certified Course Map

Loc

**Certified Course****NY15001JJ**Effective: 1/02/2015
Through: 12/31/2025

Course Distance:	10 Miles
Date Measured:	December
Measured By:	Jeff John BuffaloR
Calibration Course:	NY14001
Notes:	Map not to have use o





Urban Park Towers Project Description

Orbach Affordable Housing Solutions, LLC ("OAHS") is a long-time owner in the affordable arena and has many years of experience with preservation rehabs. In 2020, LH Urban Park Towers LLC, an affiliate of OAHS, acquired Urban Park Towers Apartments ("Urban Park"). Urban Park is a 150-unit Senior Section 8 project located at 77 Main Street, Lockport, NY 14094. OAHS acquired the housing with the goal of securing financing to complete a substantial renovation of the property. The development planning process is now nearing completion and OAHS anticipates closing on the financing for this rehabilitation by the end of this year.

The proposed financing structure includes tax-exempt bonds from the Niagara County Industrial Development Agency and as-of-right 4% tax credits from NY Homes and Community Renewal. RedStone Mortgage will provide the mortgage debt financing and Raymond James will provide the tax credit equity. To facilitate the new financing, the property will be transferred to a new ownership entity that will then transfer the property's beneficial ownership to a related not-for-profit Housing Development Fund Corporation. The PILOT agreement with the City of Lockport is a critical component of this project and the financing structure and will need to be revised/redrafted to reflect the ownership structure and tax exempt financing with IDA.

The planned renovations include, but are not limited to, kitchen and bathroom renovation, parking lot repairs, exterior lighting upgrades, hallway and lobby renovation, Façade repairs and roof replacement. A preliminary construction budget is attached.

Urban Park Apartments
Preliminary Scope/Budget
727/2021

Item	Quantity	Unit Cost	Sub-Total
Number of Units / ADA Units	150 / 8		
Building Interiors	12		
Bathrooms			
Bathroom renovation (demo, straighten walls, frame and level ceiling, install gfi's, sheetrock, durock, ceramic tile install, install sink, vanity, faucet, med cab, tub faucet and shower curtain rod, new tub and new toilet, new plumbing, tile stops)	150	\$7,500	\$1,125,000
Sheet Vinyl floor and base	150	\$350	\$52,500
Lighting Replacement	150	\$100	\$15,000
New Medicine Cabinets	150	\$100	\$15,000
Grab bars	150	\$250	\$37,500
New exxhaust	150	\$250	\$37,500
Bathroom accessories	150	\$150	\$22,500
ADA units	8	\$2,500	\$20,000
Kitchens			
Demo existing and supply and Install Kitchen Cabinets with Countertops and Backsplash	150	\$4,500	\$675,000
Supply and Install LVT flooring and dispose of existing	150	\$1,000	\$150,000
Microwave Range Hoods	150	\$300	\$45,000
Refrigerators	150	\$750	\$112,500
Stoves	150	\$500	\$75,000
CAV	150	\$250	\$37,500
Garbage Disposal and Plumbing work	150	\$750	\$112,500
Lighting Replacement	150	\$100	\$15,000
GFI outlets	150	\$250	\$37,500
ADA Units	8	\$2,500	\$20,000
General Interior (BR/LR/DR)			
Replace elecric fin tube radiators and enclosures	150	\$500	\$75,000
Smoke/CO2 Detectors	150	\$500	\$75,000
Replace front door hardware	150	\$150	\$22,500
Heavy Duty Slide Track for Closet Doors	150	\$150	\$22,500
Light Fixtures in Hallway	150	\$100	\$15,000
Furnish and install inteior doors and hardware	150	\$1,000	\$150,000
Misc. Carpentry	150	\$300	\$45,000
Supply and Install new shelving and poles (3 closets)	150	\$450	\$67,500
Install and Supply 5 1/4" base molding	150	\$300	\$45,000
Painting	150	\$1,800	\$270,000
Rough and fine clean apartment	150	\$500	\$75,000
HVI unit upgrades	3	\$2,500	\$7,500
Supply and Install LVT flooring and dispose of existing	150	\$2,500	\$375,000

Urban Park Apartments
Preliminary Scope/Budget
7/27/2021

Item	Quantity	Unit Cost	Sub-Total
Common Areas			
Hallway Renovation (Painting, new VCT Floor, New lighting fixtures, install cove base 4 1/4")	12	\$25,000	\$300,000
Elevator Upgrades	Lump Sum	\$400,000	\$400,000
Community Room and bathrooms	Lump Sum	\$50,000	\$50,000
Replace exit lights	12	\$2,500	\$30,000
Lobby Renovation	Lump Sum	\$25,000	\$25,000
Stairwell painting	Lump Sum	\$40,000	\$40,000
Replace Intercom system	Lump Sum	\$75,000	\$75,000
Upgrade security system	Lump Sum	\$100,000	\$100,000
Management/Leasing Office renovations	Lump Sum	\$25,000	\$25,000
Door switches at trash rooms	12	\$250	\$3,000
Backup Generator	Lump Sum	\$100,000	\$100,000
replace Hot water heaters	Lump Sum	\$50,000	\$50,000
Common Area wifi	Lump Sum	\$25,000	\$25,000
Pendant Emergency Response System	Lump Sum	\$75,000	\$75,000
New Compactor	Lump Sum	\$50,000	\$50,000
Site Improvements			
Repair walks, curbs, ramp	Lump Sum	\$25,000	\$25,000
Asphalt Parking Lot Repairs and Seal coat/Stripe in back	Lump Sum	\$50,000	\$50,000
Landscaping, benches and fencing	Lump Sum	\$25,000	\$25,000
Exterior Lighting Upgrades	Lump Sum	\$20,000	\$20,000
Building Envelope			
Update Façade, Repairs, power washing	Lump Sum	\$1,150,000	\$1,150,000
New Canopy and Signage	Lump Sum	\$35,000	\$35,000
Storefront Entrance	Lump Sum	\$25,000	\$25,000
Roof replacement	Lump Sum	\$750,000	\$750,000
New Air Handlers / Exhaust fans	Lump Sum	\$250,000	\$250,000
			\$7,528,000

Cost Breakdown	per unit (150)	
Building Interiors	\$25,666.67	\$3,850,000
Common Areas	\$8,986.67	\$1,348,000
Site Improvements	\$800.00	\$120,000
Building Envelope	\$14,733.33	\$2,210,000
	\$50,187	\$7,528,000

General Conditions (6%)	\$451,680
Overhead (2%)	\$150,560
Profit (6%)	\$451,680
Total	\$8,581,920
Contingency (10%)	\$858,192

Urban Park Apartments
Preliminary Scope/Budget
727/2021

Item	Quantity	Unit Cost	Sub-Total
Total Hard Cost Budget			\$9,440,112



Symptom Management & Caregiver Relief

9

4675 Sunset Drive
Lockport, NY 14094-1231
Phone: 716-439-4417
TDD: 1-800-662-1220
NiagaraHospice.org

Attn: Michael Hoffman
City of Lockport Clerk's Office
1 Locks Plaza
Lockport, NY 14094
December 14, 2022

Dear Michael,

Thank you for your continued support of the Hospice Gran Fondo.

We are planning for a great event this year and we would like to request **Saturday, August 5th, 2023** for this year's race. We plan to keep the same three routes as we did last year with our start and finish line at Niagara Hospice, 4675 Sunset Drive, Lockport. We would also like to request the closure of W. Jackson St. from 7:00am-1:00pm on Saturday, August 5th, 2023.

I would be glad to come and discuss the event if needed and answer any questions you might have. Our event continues to raise thousands of dollars for Niagara Hospice and is becoming a "bucket list" race in the area.

We are looking forward to this year and appreciate your continued support. If you have any questions or concerns, please feel free to contact me at 716-280-0766.

Sincerely,

Allison Bolt
Special Events Coordinator
Niagara Hospice
4675 Sunset Drive
Lockport, NY 14094



*Serving Niagara
County residents
since 1988*

10, 11, 12

apolichette@lockportny.gov

From: Tim Russo <trusso@lockportny.gov>
Sent: Thursday, January 19, 2023 9:49 AM
To: apolichette@lockportny.gov
Cc: cityclerk@lockportny.gov; 'Michelle Roman'; 'Sue Mawhiney'; 'Laura Miskell Benedict'
Subject: RE: Resolutions for Next Week
Attachments: Billing RFP Bid 1.pdf; Billing Bid 2.pdf; Consultation Bid.pdf; Recovery Backup.pdf; Resolutions.docx

Hello,

Attached in the word doc are three resolutions, two to accept the RFPs and 1 for insurance recoveries. Backup is also provided in pdf files.

Thanks,



Timothy Russo
Director of Finance
Finance Department
City of Lockport, NY
716.439.6631

From: Tim Russo <trusso@lockportny.gov>
Sent: Wednesday, January 18, 2023 12:47 PM
To: 'apolichette@lockportny.gov' <apolichette@lockportny.gov>
Cc: 'cityclerk@lockportny.gov' <cityclerk@lockportny.gov>; 'Michelle Roman' <romanforlockport@gmail.com>; 'Sue Mawhiney' <smawhiney@lockportny.gov>; 'Laura Miskell Benedict' <lmiskell31@hotmail.com>
Subject: Resolutions for Next Week

Hello,

I will have two resolutions for next week-

- Accept bid for the Emergency Medical Services Billing RFP
- Accept bid for Ambulance Consultation Services RFP

I am pulling the resolutions for the financial policies until a later point given the status of the council.

Thanks!



Timothy Russo
Director of Finance
Finance Department
City of Lockport, NY
716.439.6631

66 Main Street, Suite B
Plymouth, NH 03264

International Drive
Portsmouth, NH



Telephone: (603) 279-0352
Toll Free: (866) 501-0352

all@mrigov.com
www.mrigov.com

**RESPONSE TO
REQUEST FOR PROPOSAL
CITY OF LOCKPORT, NY
LOCKPORT FIRE DEPARTMENT
AMBULANCE CONSULTATION SERVICES**

January 17, 2023

SECTION 1: LETTER OF TRANSMITTAL

Municipal Resources, Inc. ("MRI") is pleased to submit this response to your Request for Information/Quotation for ambulance consultation services to provide the City of Lockport with technical assistance in the development of an ambulance transport services within the Lockport Fire Department.

MRI was established 30 years ago and is very well known for its expertise in public safety including police, fire and EMS operations. MRI has completed hundreds of projects from Madison, Georgia to Presque Isle, Maine. However, we are best known for our expertise in working with and providing viable solutions for New England municipalities. The best way to verify our proven track record is to contact the references listed under **Appendix A**. Our reputation for client satisfaction and developing attainable and fiscally realistic recommendations will speak for itself.

Alan S. Gould, President, will serve as Principal-In-Charge of this engagement, coordinating activities, interfacing directly with the Client, and participating throughout the engagement as required. Brian P. Duggan will serve as Project Manager/Senior Consultant on this project.

MUNICIPAL RESOURCES, INC.

66 Main Street, Suite B
Plymouth, NH 03264
(603) 279-0352
(866) 501-0352 TOLL FREE
www.mrigov.com

PROJECT MANAGER

Brian Duggan, Director Fire & EMS Services
Municipal Resources, Inc.
66 Main Street, Suite B
Plymouth, NH 03264
(413) 563-7610

bduggan@mrigov.com

After reviewing your e-mail and considering our conversation, we believe that we can provide practitioner based advice, consultation and technical assistance relative to the development of this fire-based EMS service. Members of our team offer a unique lens of experience as we have worked to develop a number of fire-based local and regional EMS services.

Our team has extensive experience both creating, evaluating and optimizing EMS services. This includes conducting initial and ongoing audits and fiscal analysis to determine the level of success as a separate division or business unit of a fire department.

Our fees would consist of the following:

- **\$150.00 per consulting hour**
- **\$75.00 per travel hour**
- **Mileage; IRS rate**
- **Expenses: Actual cost plus a 10% administrative fee**

Based on our conversation we would be willing to work collaboratively with the City and provide technical assistance to the Lockport Fire Department to guide the successful implementation of this fire based EMS transport system.

Respectfully submitted by Municipal Resources, Inc.,

By: _____



Brian P. Duggan, Director of Fire & EMS Services
(413) 563-7610 Cell

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SECTION 3: PROFILE OF PROPOSER

Municipal Resources, Inc. (MRI) provides quality service at an affordable price. We have the technical knowledge and practical experience that others cannot offer because we hire the best in the municipal consulting industry. This is evidenced by a high level of implementation of MRI's recommendations by its clients. Municipal Resources is capable of performing multiple projects at the same time because of the depth that we have acquired through the number of employees and affiliates we maintain. We also can draw upon a wide array of talent because of our unique business approach. Our clients have come to expect Municipal Resources to provide for whatever they need, and we fulfill their expectations.

Municipal Resources, Inc. was founded in 1989 by six former municipal and state government managers, with both public and private professional experience. Municipal Resources is dedicated to providing professional, technical, and management support services to municipalities and schools throughout New England. Municipal Resources operates offices in two locations in New Hampshire and one in Massachusetts. We are registered to do business in Maine, New Hampshire, Vermont, Massachusetts, Connecticut, Rhode Island, New Jersey, New York, and Pennsylvania.

Among the areas of expertise available are department assessments, organizational studies, personnel recruitment, personnel administration, collective bargaining, community and economic development, budget/finance, and general management. MRI has a particularly strong public safety group with nationally recognized expertise in police, fire, and emergency services.

We want to help solve problems and provide solutions for future success. We do not assess blame; rather, we simply work to gain an understanding of past events to build a framework for future success. We do not put forth idealistic, unachievable, or narrowly focused solutions.

Our objectives are:

- To help agencies obtain maximum value for limited tax dollars.
- To identify and help communities manage the risks associated with public safety functions.
- To raise public awareness of the value and professionalism of their public resources.
- To help local leaders develop and execute plans that best meet their community's needs, given the resources available.

Finally, our market, focus and expertise, is New England based. We are intimately familiar with New England local government forms, culture, and issues, and pride ourselves on our ability to place our recommendations for change in a context appropriate to New England local government.

SECTION 4: REFERENCES & QUALIFICATIONS

A full listing of our fire and EMS references is contained within **Appendix A**. The list below indicates projects that have some commonality with this proposal.

Section 4.1 Previous Project Description and References

MRI has completed more than 200 similar projects involving the facilitation of input and development of strategic planning /visioning initiatives. A few of our more recent references are listed below:

Wells, Maine – 2022

EMS Service Delivery Study

Town of Wells

Wells Town Hall

Larissa Crockett, Town Manager

Tel (207) 646-5113

E-mail: lcrockett@wellstown.org

Manchester, VT - 2022

EMS Service Delivery Study

Town of Manchester

Manchester Town Hall

John O'Keefe, Town Manager

Tel (207) 646-5113

E-mail: j.okeefe@manchester-vt.gov

Chester County PA - 2019-2020

Fire EMS Model Review, Strategic Planning 2019-2020

Chester County Government Services Center

Beau Crowding, Director of Operations

Chester County Emergency Services

tel:(610)+344-5148

gcrowding@chesco.org

Everett, MA -2021

Organizational Assessment

Fire & EMS Service Technical Assistance 2021

Eric J. Demas, CFE, MBA

Chief Financial Officer / City Auditor

City of Everett

484 Broadway, Room 14

Everett, MA 02149

617-394-2210

Eric.Demas@ci.everett.ma.us

Foxborough, MA - 2019

Public Safety Study

William Keegan, Jr., Town Manager

40 South Street Foxborough, MA 02035

Town of Foxborough

Michael Kelleher

Chief of Department

Foxborough Fire & Rescue

8 Chestnut St.

Foxborough, MA 02035

O: (508)543-1230

mkelleher@foxboroughfire.com

Saco ME - 2018

Fire EMS study - 2018

Chief John Duross

Saco Fire Department

300 Main street

Saco, Maine 04072

207-282-3244

JDuross@sacomaine.org

Westborough, MA - 2019

Fire EMS Study 2019

Fire Chief Patrick Purcell

Westborough Fire Department

42 Milk Street

Westborough, MA 01581

(508) 389-2311

ppurcell@town.westborough.ma.us

Three most recent clients; how they used MRI's work; and subsequent effect on their operations:

- **Manchester, VT:** EMS service delivery study and development of alternative service options and a revised agreement to enhance the level of EMS service within the Town of Manchester.
- **Wells, Maine:** EMS operational study designed to enhance the level of service and deployment provided to the Town. This project had a focus on organizational culture and identifying relationship gaps between fire and EMS first responders.
- **Everett, MA:** Initiating a backup BLS service to work in conjunction with a private ALS provider. Report resulted in approval to move toward per diem staffing during peak hours of service demand.

STATEMENT QUALIFICATIONS AS IT RELATES TO EMS SERVICES

Municipal Resources, Inc. (MRI) has completed more than 200 Fire and Emergency Medical Services studies over the last quarter of a century. Please refer to our list of references for specifics on recent projects. Our experience is bolstered by the expertise of our fire/EMS staff. Brian Duggan, the project manager assigned to this engagement, directs all of MRI's fire/Rescue/EMS and emergency management consulting services. Specific qualifications of the project manager include:

- 40 years of experience within several public safety organizations;
- Provided leadership to the Massachusetts Fire & EMS Mobilization System for more than 20 years;
- Served in several positions at the Massachusetts Department of Fire Services;
- 40 years of experience as a nationally registered EMT;
- Developed several public private EMS organizations;
- Created three regional ALS services;
- Serviced as a fire/EMS chief in two Massachusetts communities for a total of 28 years;
- Worked for more than 5 public and private EMS organizations;
- Credentialed as a Chief Fire Officer;
- Holds two advanced degrees.

In addition, all members of the project team are current or previous practitioners and have been involved in the provision of EMS services for more than 25 years.

- **Several project team members have served as EMS practitioners in the roles of EMT's and Paramedics for decades.**

- Several project team members have led ALS services in Massachusetts.
- Several members of the project team have supervised EMS services in other States thus providing the ability to provide an external perspective.
- Two project team members have developed regional ALS services in Massachusetts serving populations of over 100,000.
- Three members of the Project team are currently involved in the formation of a regional ALS service in Cheshire County, New Hampshire.
- One Team member is credentialed as a Chief Medical Officer by the Center for Public Safety Excellence.
- Team members have led more than six ALS services in New England.
- All project team members have worked with GIS and performance metric-based EMS deployment analysis.
- One project team member has a doctorate while several others have advanced degrees and have been published.
- Three members of the team have been published, including Chief Duggan who was recognized for an outstanding thesis during his Master's program at the Naval Post Graduate School. In addition, Chief Duggan has written multiple editions of the Technology Chapter in the NFPA Fire Protection handbook.
- All team members have significant experience in performing fire and emergency services operational assessments.

Specific references relevant to this project include:

City of Taunton

Emergency Telecommunications Operational Study – Ongoing
Taunton City Hall

Patrick D. Dello Russo Jr.

Chief Financial Officer

City of Taunton

15 Summer Street

Taunton MA 02780

508-821-1000 ext. 1126

Chester County PA - 2020

Fire EMS Model Review, Strategic Planning 2019-2020

Chester County Government Services Center

Beau Crowding, Director of Operations

Chester County Emergency Services

tel:(610)+344-5148

gcrowding@chesco.org

Everett, MA -2021-2022

Organizational Assessment

Fire & EMS Service Technical Assistance 2021

EMS Billing Technical Assistance - 2022

Eric J. Demas, CFE, MBA

Chief Financial Officer / City Auditor

City of Everett

484 Broadway, Room 14

Everett, MA 02149

617-394-2210

Eric.Demas@ci.everett.ma.us

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Public Safety Study

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mkelleher@foxboroughfire.com

Westborough, MA - 2019

Fire EMS Study 2019

Fire Chief Patrick Purcell

Westborough Fire Department

42 Milk Street

Westborough, MA 01581

(508) 389-2311

ppurcell@town.westborough.ma.us

Municipal Resources, Inc.'s Proven Track Record

MRI has completed more than 200 similar fire service assessments. The best way to verify our proven track record is to contact the references listed under **Appendix A**. Our reputation for client satisfaction and developing attainable and fiscally realistic recommendations will speak for itself. Although adoption of recommendations varies by community, we are proud to note that over time, a number of communities have adopted in excess of 80% of the recommendations put forth through an organizational assessment.

SECTION 4.2: STAFF AND PROJECT TEAM

All Principal Consultants affiliated with the firm have substantial experience in government service, a background which proves beneficial to our clients, as we are able to fully understand and address the issues and concerns of the officials and decision makers with whom we do business.

We believe that Municipal Resources has the best collection of talent that any consultant can produce at any price. Generally, our affiliates are current or recently retired practitioners in their field. They have held or hold positions at or near the top in their respective fields. All are previous veterans of consulting assignments, and have Regional, and in some cases, National reputations. We believe this team has the ability to provide your organization with a full range of services necessary to successfully address your current needs. While our technical evaluation is done by in-service experts, all of our recommendations are carefully considered by our own managers before being put forward for your consideration.

In keeping with Municipal Resources' hallmark multi-disciplinary approach to problem solving, we plan to use the following team:

Director of Fire Services – Client Service Leader

Brian P. Duggan retired from the Fire Department in Northampton, Massachusetts, where he instituted substantial changes to modernize and restructure the entire department including equipment, facilities, personnel, and training. In conjunction with his staff, Brian integrated Emergency Medical Services (EMS) into the organization and created a regional Advanced Life Support (ALS) Program that currently serves 18 communities within the Northampton Area. He formerly commanded the Northborough, Massachusetts, Fire Department, and has significant experience with the Massachusetts Department of Fire Services where over three decades, he held several key positions. Following his retirement, Brian has continued his active fire service involvement by serving as both a volunteer chief fire officer and through continuing to develop training and certification programs as a program Coordinator for the Massachusetts Department of Fire Services.

Mr. Duggan developed and directed the Graduate and Undergraduate Fire Science Programs at Anna Maria College in Paxton Massachusetts from 1995 - 2003. Mr. Duggan has a Business Management/Fire Science degree from Providence College and a Master's Degree of Business Administration (MBA) from Nichols College in Dudley, Massachusetts. He is also a graduate of the National Fire Academy Executive Fire Officer Program and the Senior Executive Program for State and Local Leaders at Harvard University. In December 2012, Mr. Duggan received a Master's Degree in Homeland Security through the Naval Post Graduate School based in Monterey, California, where his thesis entitled *"Enhancing Decision-making during the First Operational Period of Surge Events"* was selected as an outstanding thesis. He was one of the first fire service professionals to be designated as a Chief Fire Officer by the Commission on Fire Accreditation International.

Brian led the Massachusetts fire service through his affiliation as Chairman of the Fire Chief Association of Massachusetts Technology Committee and as a Regional Director on the Massachusetts State Fire Mobilization Committee. Mr. Duggan has authored several publications, inclusive of writing Section 7, Chapter 3, Fire Department Information Systems, in the Nineteenth and Twentieth Editions of the National Fire Protection Association's Fire Protection Handbook. Chief Duggan has been affiliated with MRI as a subject matter advisor since 2002 and he has served as Director of Fire Services since 2015. Currently, Mr. Duggan is regarded as an expert specific to fire service response to photovoltaic and battery energy storage system (BESS) emergencies. He has developed several nationwide training programs providing first responders with new insight on these emerging challenges.

Project Managers

Patrick J Purcell serves as the Fire Chief and Emergency Management Director for the Town of Westborough, Massachusetts. The Town of Westborough Fire Department, which provides full fire, rescue, emergency medical services, and public safety dispatch, is staffed by 45 career firefighters and 9 career public safety dispatchers who serve a residential population of 19,100 and a large transient population, primarily during the daytime hours. During his career Pat has administered an annual fire department budget of nearly \$5 million. Pat had also served as a paramedic for Worcester EMS and Life Flight Helicopter at Umass Memorial Health Care for 24 years. He has an associate degree in Paramedic Science from Quinsigamond Community College, a bachelor's degree in Criminal Justice and Graduate Degree in Fire Service Administration from Anna Maria College. He is a graduate of the Chief Fire Officer Program administered by the Edward J. Collins Center for Public Management at Umass Boston and the Massachusetts Department of Fire Services. He is a member of the International Association of Fire Chiefs and the New England Association of Fire Chiefs. Pat has a diverse background and expertise in Firefighting, EMS, Dispatch, Emergency Planning and Operations, Grant Writing, and Municipal Finance and Government and Labor/Management relations. In addition he has been instrumental in developing a joint public safety dispatch center for the Town of Westborough and has participated in a number of municipal assessment centers.

Peter J. Finley, Jr. most recently served as Chief of the Winslow Township Fire Department in New Jersey, where he was responsible for the planning, establishment, and initial deployment of the career component of the department. He previously served for 4 ½ years as the Chief of Department for the City of Vineland, New Jersey Fire Department where he initiated significant changes within the department including updating and modernizing equipment, providing the department's first ever formal officer training, and significantly increasing the capabilities of the regional hazardous materials response team. During his tenure the department received more than one million dollars in various grants. He formerly commanded the Vineland Rescue Squad gaining significant EMS operations and command experience, as well as completing an overhaul of that organization's operations. Chief Finley serves as an Adjunct Professor in the Fire Science Program at Camden County College. Chief Finley received his Associate in Applied Science degree from Atlantic Community College in New Jersey and earned his Bachelor of Science degree in Fire Science/Administration from the University of Maryland. He is a graduate of the National Fire Academy's Executive Fire Officer Program, earning perfect scores on three of his four Applied Research Projects. He was awarded an Outstanding Research Award for his 2002 paper titled, "Residential Fire Alarm Systems: The Verification and Response Dilemma". Chief Finley holds nearly two dozen state and national certifications and is a member of a number of fire service organizations, including achieving the prestigious Chief Fire Officer designation from the Commission on Fire Accreditation International. He is a member of a number of fire service organizations and is currently serving as President of the New Jersey Career Fire Chiefs Association where he has been involved in the development and administration of fire service promotional examinations. From 2003–2005 he served on the Training and Education Committee of the Governor's Fire Service and Safety Task Force. He also previously served on the state committee that developed New Jersey's first Firefighter I Instructor Manual.

Subconsultants

Danny K. Opperman, MBA, NRP has been involved in Emergency Medical Services since 2000, where he started in the U.S. Air Force, deploying all over the world as an Aerospace Medical Specialist. Mr. Opperman is a veteran of the Iraq War where he deployed as a medic providing medical treatment to wounded military personnel in an undisclosed location in the Middle East. At his home unit, he coordinated and conducted all training with medical personnel who were certified EMS providers. He also coordinated a military base wide training exercise to ensure all assigned personnel were trained in first-aid on a yearly basis. More recently, Mr. Opperman was a Battalion Chief of EMS Operations at AtlantiCare Health System in Atlantic City, New Jersey. Daily operations consisted of eight ALS units, three SCT critical care units, one medevac unit, ten BLS units and a medical communications center, all stretched over two counties. Mr. Opperman coordinated daily staffing, scheduling, logistical necessities with equipment and strategic oversight of EMS unit placement. While serving as Battalion Chief, he also developed the full curriculum and assisted with the oversight of daily operations for a paramedic educational program with Atlantic Cape Community College, in Atlantic City, New Jersey. He coordinated all clinical activities with AtlantiCare so that paramedic students were able to complete all hospital and field time hours prior to obtaining their paramedic certification. Mr. Opperman has worked

at several community colleges teaching various subjects such as EKG Interpretation to nursing students and Clinical Simulation with paramedic students. Currently, Mr. Opperman works for the Philadelphia College of Osteopathic Medicine as the Manager of Clinical Simulation. He has daily oversight of the simulation center's operations and coordinates all clinical simulation activities for students studying Doctor of Osteopathy and Physician Assistant studies on the Philadelphia, Pennsylvania campus. He also works per-diem in southern New Jersey with Inspira Health as a field paramedic. Mr. Opperman holds numerous certifications in EMS, Instructor of EMS and in clinical simulation. He holds three Associate Degrees, one from the Community College of the Air Force in Allied Health Science and two from Camden County College in Paramedic Science and Paramedic Education and Management. He has a Bachelor's Degree from Wilmington University in Business Management and a Master's in Business Administration specializing in Healthcare Administration from Capella University in Minneapolis, Minnesota.

Peter Burke Jr. - joined Seekonk Fire Department as a career Firefighter/EMT in 2002. During his tenure in Seekonk he developed or coordinated several programs within the department including numerous training efforts to improve firefighter safety. Chief Burke also spent time as a fire prevention officer during a period of rapid growth in the community. He served on the executive board and as president of Seekonk Firefighters Local 1931. He ended his time in Seekonk as a shift commander. In 2012 Chief Burke accepted the position as Deputy Fire Chief in Barnstable Village. While there he was successful in receiving multiple grants. He was responsible for several regional training initiatives engaging a wide variety of stakeholders. In 2017 he was appointed as the Fire Chief of the Hyannis Fire Department. Hyannis is a 9 square mile census designated urban area with a diverse population. While in Hyannis he has focused on team building and progression while improving technology, equipment, operations, staffing, and training. He has worked closely with the Coast Guard as a member of the Area Maritime Security Committee and the Army National Guard in improving cooperation and communication. Burke is a technician and steering committee member on the regional District Hazardous Materials Response Team serving 103 communities in Southeastern Massachusetts. Burke is an instructor at the Massachusetts Firefighting Academy and has taught extensively in the recruit, technical rescue, hazardous materials, and rapid intervention programs. Burke is an Adjunct Professor at Cape Cod Community College. He holds a Bachelor's Degree in Fire Science from Providence College and a Master's Degree in Emergency Management from the Massachusetts Maritime Academy, where he was the recipient of the Jerry S. Parr award for excellence. Burke is a graduate of the Chief Fire Officer Program jointly conducted by the Firefighting Academy and UMASS Boston's Collins Institute. He is also a graduate of the Harvard Kennedy School Leadership in Homeland Security Program and is completing the Suffolk University Local Government Leadership and Management certificate program. Chief Burke lives in Barnstable with his wife Jessica and three children; Brendan, Grace, and Jack.

SECTION 5: SCOPE OF SERVICES AND PROJECT GOALS

The City of Lockport, in conjunction with the Lockport Fire Department is seeking proposals from qualified and responsible consultants to obtain EMS based consultation services and technical assistance. The scope of this consultation service would include key aspects of the fire department's first year implementation of the ambulance program. This includes:

- Assist as needed in negotiations for reimbursements and billing for ambulance services and care with appropriate insurance providers with the goal of having fully executed payer contracts in place.
- Working with department to ensure that operations are implemented and developed with an appropriate framework that promotes effective and efficient ambulatory services. This includes oversight and consultation relating to personnel, training, technological needs, and other aspects as needed.
- Coordinate and help establish the revenue cycle business process, particularly as it relates to the relationship between City's required in-house billing coordinator position as well as an external billing company. Provide recommendations on how to maximize revenue and cash experience.
- Ensure that ambulance operations in the City are adhering to all regulatory requirements.
- Conduct periodic reviews and fiscal audits as directed by the Fire Committee and/or administration to identify issues, trends or other matters that may require financial, operational and/or regulatory action to ensure compliance and reasonable operational and financial outcomes.

SECTION 6 : INFORMATION TO BE PROVIDED BY THE CITY

MRI structures our proposals as a partnership with a community. Although we could develop the data listed below, it would take an excessive amount of time and detract from the overall value of our analysis. As such, we ask the Mayor and the Fire Chief to assign personnel to gather a summary of this information as necessary, at the request of the MRI team. **We are looking for a summary overview, not reams of data pertaining to each point listed below.** It is our goal that each of our team members becomes familiar with the organization and the area so that we can arrive in your community and “hit the ground running” thus asking more informed questions and providing the community with a better value in terms of product depth and quality.

Prior to our first virtual or in-person field visit, we request that the following documents and information from the City should be developed and delivered to the project manager.

The purpose of this request is to inform our team and provide baseline data so that we can provided appropriate consultation.

The project requires a data set to determine a baseline of current operations. We request that the following documents and information be developed and delivered to the project manager.

- a. An overview of community population and demographics;
- b. An overview of expected community growth and development;
- c. An overview of the organizational structure of the Lockport Fire Department including staffing, scheduling and deployment patterns;
- d. A map indicating where units are posted and or deployed.
- e. A summary of EMS service demand
- f. A breakdown of ALS and BLS volume
- g. A copy of municipal ordinances related to EMS service delivery;

Note: All data must be provided electronically to facilitate delivery to all team members.

APPENDIX A

MUNICIPAL RESOURCES, INC FIRE, EMS, AND PUBLIC SAFETY EMERGENCY TELECOMMUNICATIONS REFERENCES | CLIENT LIST AUGUST 2021

CONNECTICUT		
Milford, CT	Fire Lieutenant Assessment 2019	(203) 783-3200
Naugatuck, CT	2 nd Assistant Chief Promotional Exam 2019 Assistant Fire Mechanic Promotional Exam 2019 Fire Captain Promotional Exam 2018, 2019, 2021 Fire Lieutenant Promotional Exams 2018 Fire Mechanic Assessment 2019	(203) 720-5265 Chief Paul Russell John Lawlor, Human Resources Director
Preston, CT	Organizational Assessment 2004	(860) 887-5581
Salem, CT	Needs Study 2013	(860) 859-3873
Southington, CT	Fire Department Promo Exams 2019 Fire Chief Assessment Center 2017 Fire Chief Recruitment 2018 Firefighter Entrance Exam 2017, 2020 Fire Inspector Exam 2015 Lt. and Captain Promotional Process 2015 Firefighter Entrance Exam 2007, 2009, 2011 Lt. Assessment Center 2007, 2011 Captain Assessment Center 2007, 2011	(860) 621-3202 Fire Chief James Paul Maureen Frazier, Office Manager
University of Connecticut	Fire Lt & Captain Promotional Process 2018	(860) 486-4925
Westport, CT	Fire Inspector Assessment 2019 Assistant Fire Chief Assessment 2017, 2021 Fire Lieutenant Exams 2017, 2019 Fire Inspector Assessment Center 2016 Assistant Chief and Lieutenant Promotional Process 2015	(203) 341-5000 Fire Chief Rob Yost Asst. Chief Brett Kirby
GEORGIA		
Rincon, GA	Technical Assistance 2020-2021	John Klimm, City Manager
MAINE		
Berwick, ME	Fire Study 2012	(207) 698-1101
Dexter, ME	Capital Planning and Fire Study 2009	(207) 924-7351

Gray, ME	Fire Mentoring 2020 Fire Service Technical Assistance 2020	(207) 657-3339
Houlton, ME	EMS Study 2016	(207) 532-7111
Kennebunk, ME	Organizational Assessment 2007	(207) 985-2102
Knox County, ME	Organizational Assessment 2013	(207) 594-0420
New Gloucester, ME	Fire, DPW Risk Assessment 2020	(207) 926-4126
Old Town, ME	Organizational Assessment 2011	(207) 827-3962
Presque Isle, ME	Fire Study 2011	(207) 760-2785
Westbrook, ME	Interim Deputy Fire Chief 2009	(207) 591-8126
Saco, ME	Fire Study 2017	(207) 282-3244
MASSACHUSETTES		
Acton, MA	Fire Study 2016 Fire Chief Recruitment 2011 Fire Captain Exam 2011 Fire Lieutenant Exam 2011 Fire Services Review 2008	(978) 929-6611
Amesbury, MA	Fire Lt Assessment Center 2020 Fire Dept Admin & Staffing Study 2019	(978) 388-8165
Andover, MA	Fire Chief Assessment Center 2006 Fire Study 2006	(978) 623-8225
Auburn, MA	Fire Captain Assessment Ctr 2015	(508) 832-7800
Avon, MA	Organizational Assessment 2003 Fire Chief Recruitment 2004 & 2006	(508) 588-0414
Barnstable, MA	Fire Department Staffing Study 2020 Firefighter Background Check 2016, 2018, 2019 Deputy Fire Chief Recruitment 2009 & 2012 Fire Lt. Assessment Center 2011 Fire Captain Assessment Center 2011	(508) 862-4000
Belmont, MA	Fire Chief Recruitment, 2020	(617) 993-2610
Berlin, MA	Fire Chief Recruitment 2019 Organizational Assessment 2014	(978) 838-2442
Beverly, MA	Public Safety Dispatch Study 2017 Console Meeting Facilitation 2018	(978) 922-2424
Brookline, MA	Fire Chief Recruitment 2004 & 2011	(617) 730-2210
Carlisle, MA	Fire Chief Recruitment 2018 Fire Leadership Staffing Study 2015	(978) 371-6688
Chatham, MA	Organizational Assessment 2010 (including dispatch consolidation)	(508) 945-2324
Cheshire, MA	SAFER Grant Needs Assessment 2007	(413) 743-5953
Chicopee, MA	Fire and Police Job Descriptions 2017 Fire Chief Assessment Center 2016	(413) 594-1619
C-O-MM Fire District	Fire Lieutenant Exam 2016, 2019 Fire Captain Assessment 2015, 2018 Fire Chief Recruitment 2013	(508) 790-2375

Concord, MA	Assistant Fire Chief Assessment Center 2018	(978) 318-3451
Cotuit, MA	Fire Chief Recruitment 2017 Fire Lt. Assessment Center 2008	(508) 428-2210
Danvers, MA	Dispatch Study 2017 (Danvers, Hamilton & Manchester)	(978) 777-0001
Dedham, MA	Fire Dept. Risk Management Assessment 2016	(978) 452- 1227
Dunstable, MA	Interim Fire Manager 2019	
Easthampton, MA	Deputy Fire Chief Assessment Center 2006	(413) 527-4200
East Longmeadow, MA	Fire Chief Assessment Center 2007	(413) 525-5400
Essex County Regional Emergency Communication Ctr	Operations, Management and Finance Audit 2017-2018	
Foxborough, MA	Public Safety Study 2019	
Franklin, MA	Deputy Fire Chief Assessment 2018 Fire Captain Promotional Process 2018	(508) 528-2323
Georgetown, MA	Fire Study 2018	(978) 352-5755
Gloucester, MA	Interim Fire Chief 2012 Fire Chief Recruitment & Assessment Ctr. 2012 Public Safety Study 2008	(978) 281-9700
Grafton, MA	Fire Service Technical Assistance 2019 Fire Study 2018	
Granby, MA	Fire Chief Assessment Center 2005	(413) 467-3101
Greenfield, MA	Deputy Fire Chief Assess. Ctr. 2006	(413) 774-4323
Groton, MA	Fire Department Strategic Plan 2016	(978) 448-6333
Groveland, MA	Fire Department Staffing Study 2018	(978) 556-7204
Hadley, MA	Fire Study 2011	(413) 586-0221
Hamilton, MA	Dispatch Study 2017 (Hamilton, Ipswich, and Manchester-by-the-Sea)	(978) 468-5572
Hopkinton, MA	Fire Lieutenant Exam 2017, 2018, 2021 Fire Chief Recruitment 2016 Deputy Fire Chief Assessment Ctr 2016 Firefighter Entrance Exam 2014	(508) 497-2323
Hyannis, MA	Fire Chief Recruitment & Assess Ctr. 2017 Fire Lt & Captain Assessment 2018 Fire Study 2008	(508) 775-1300
Ipswich, MA	Dispatch Study 2016 Organizational Assessment 2002	(978) 356-6609

Lexington, MA	Fire Captain & Lieutenant Promo Process 2014, 2016 Fire Chief Recruitment 2012 Fire Staffing Study 2012 Fire Lieutenant Assessment Ctr. 2009 Fire Captain Assessment Ctr. 2009	(781) 862-0272
Longmeadow, MA	Fire Captain Assessment Ctr. 2015 Fire Chief Recruitment and Assessment Center 2015	(413) 565-4100
Manchester-by-the-Sea, MA	Fire Lt Written Exam 2018 Fire Services 2018 Police Chief Recruitment & Assessment Ctr. 2016 Fire Chief Recruitment & Assessment Ctr. 2016 Police/Fire/EMS Studies 2015 Dispatch Study 2014 Fire Study 2008	(978) 526-2000
Marlborough, MA	Fire Chief Recruitment and Assessment Center 2015	(508) 460-3703
Mashpee, MA	Fire Study 2011	(508) 539-1401
MassDevelopment – Devens	Fire Study 2015 Assistance w/ Police Services RFP 2012 Police Services Analysis 2010 Dispatch Study Update 2009 Emergency Planning Exercise 2005 Fire Lt. Assessment Center 2005 Dispatch Study 2005 Emergency Operations Center 2005	(978) 772-4600
Mendon, MA	Fire Chief Recruitment 2018 Interim Fire Chief Recruitment 2017 Interim Fire Technical Assistance 2016 Fire Chief Recruitment 2017 Fire Management Letter 2016	(508) 473-2312
Metropolitan Area Planning Comm (MAPC)	Ashland/Hopkinton, MA Combined Fire Services Study 2015	(508) 881-0100 x-612
Nahant, MA	Interim Fire Chief 2016	(781) 228-7254
Natick, MA	Deputy Fire Chief Assessment 2019 Fire Chief Assessment Center 2014, 2018 Fire Lt & Captain Assessment 2019	(508) 647-6400
Newbury, MA	Service Study 2016	(978) 465-0862 x-301
North Andover, MA	Fire Chief Assessment Center 2016, 2021	(978) 688-9500
North Reading, MA	Organizational Assessment 2005	(978) 664-6010
Norton, MA	Fire Lt. Assessment Center 2016	(508) 285-0248

Norwood, MA	Substitution Pay and Staffing Practices 2010	(781) 762-0080
Orange, MA	Firefighter Assessment Center 2007	(978) 544-3145
Oxford, MA	Fire Management Letter 2017 Deputy Fire Chief Assessment Center 2017	(508) 987-6030
Plympton, MA	Fire Study 2017 Interim Fire Chief Assistance 2018	(781) 585-3220
Pioneer Valley Planning Commission	Regional Emergency Services Study 2021	Eric Weiss Manager of Reg & Municipal Programs
Rutland, MA	Fire Chief Assessment Ctr. 2017	(508) 886-4131
Salem, MA	Deputy Fire Chief Assessment Ctr. 2018	(978) 619-5633
Saugus, MA	Deployment & Organization Analysis 2021	(781) 231-4111
Scituate, MA	Fire Study 2011	(781) 545-8741
Shrewsbury, MA	Deputy Fire Chief Assessment 2019	(508) 841-8522
South Hadley, MA	Fire Entrance Exam 2016 District Clerk/Treasurer Recruitment – District Two 2014 Strategic Planning 2010 EMS Assessment 2007 Fire Chief Recruitment- District One 2002 Firefighter Assessment Center- District One 2006 Fire Lt. Assessment - District Two 2006 Firefighter Assessment Center-District Two 2006	Robert Authier, Fire Chief – District One (413) 532-5343 Scott Bradley, Fire Chief – District Two (413) 534-5803
Southampton, MA	Fire Chief Assessment Center 2006	(413) 529-0106
Southborough, MA	Fire Chief Recruitment 2018	(508) 485-0710
Sudbury, MA	Fire Chief Assessment Center 2004	(978) 443-8891
Topsfield, MA	Fire Chief Recruitment 2017 Interim Fire Chief 2016	(978) 887-1599
Truro, MA	Fire Chief Assessment Ctr. 2014 Fire Study 2013	(508) 349-7004 x-10
Uxbridge, MA	Fire Chief Recruitment 2019	(508) 278-8600
Wayland, MA	Fiscal Benefit and Service Demand Analysis 2007	(617) 357-9300
Wellesley, MA	Deputy FC & Lt Assessment Center 2020 Fire Chief Recruitment 2008	(781) 431-1019
Wenham, MA	Dispatch Study 2018 Fire Chief Assessment 2018, 2019	Peter Lombardi, Town Administrator (978) 468-5520
West Stockbridge, MA	Fire Study 2016 Internal Investigation 2016	(413) 232-0300

West Suburban Managers Group (WSMG)	Regional Dispatch Study (20 Communities) 2008	(781) 455-7580
Westborough, MA	Fire Study 2018	(508) 366-3030
Westford, MA	Organizational Assessment 2007 (including dispatch consolidation)	(978) 692-5501
Weston, MA	Fire Chief Recruitment 2007	(781) 893-7320
Westwood, MA	Deputy Fire Chief Assessment Center 2018 Fire Captain Assessment Center 2018	(781) 320-1028
Wilbraham, MA	Fire Captain Assessment 2015, 2019 Shift Commander Assessment 2015 Fire Chief Recruitment 2009	(413) 596-3122
Williamstown, MA	Fire Study 2019	
Winchester, MA	Fire Chief Assessment Center 2019	(718) 721-7157
Woburn, MA	Public Safety Study 2012	(781) 897-5800
Yarmouth, MA	Fire Captain Promotional Exam 2016, 2020 Fire EMS Exam 2011 Fire Lieutenant Promo Exam 2010, 2012, 2014 Fire Captain Assessment Ctr. 2010, 2012, 2014 Deputy Chief Assessment Ctr. 2007, 2015 Fire Lt. Assessment Ctr. 2010	Philip Simonian, Fire Chief (508) 398-2212
NEW HAMPSHIRE		
Allenstown, NH	Interim Fire Manager 2017 Fire Dept. Mgt. Assessment 2016	(603) 485-4276
Amherst, NH	Fire Chief Recruitment and Assessment Center 2015 Fire/EMS Study 2015	(603) 673-6041
Atkinson, NH	Fire Study 2020	David G. Cressman, Town Administrator
Auburn, NH	Fire Study 2016	(603) 483-5052
Bedford, NH	Organizational Assessment 2006	(603) 890-2000
Bradford, NH	Interim Fire Manager 2020 PT Fire Chief Recruitment 2019	Karen Hambleton, Town Administrator
Brookline, NH	Ambulance Chief Recruitment 2020	Tad Putney, Town Administrator
Chester, NH	Review of Fire/Rescue Response 2015	(603) 887-4979
Deering, NH	Fire Chief Recruitment 2016 Fire Study 2016	(603) 464-3248
Enfield, NH	Fire EMS Integration Planning 2019	(603) 632-5026
Fremont, NH	Fire Chief Mentoring 2018-2019 Fire Study 2017-2018	(603) 895-2226
Gorham, NH	Fire Chief Recruitment 2016	(603) 466-3322
Greenland, NH	Fire Study 2017	(603) 431-7111

Hebron, NH	Fire EMS Technical Assistance 2021 Fire Assessment Study 2015	(603) 744-2631
Hooksett, NH	Fire Location Study 2010	(603) 485-8471
Keene, NH	Fire Chief Mentoring 2013	(603) 357-9858
Kingston, NH	Organizational Assessment 2006	(603) 642-3626
Laconia, NH	Overtime Staffing & Scheduling 2013	(603) 527-1270
Littleton, NH	Fire Chief Recruitment 2020 Fire Mentoring 2020 Interim Fire Manager 2020 EMS Services Study 2019	(603) 444-3996
Londonderry, NH	Fire Chief Recruitment 2007	(603) 432-1100
Loudon, NH	Fire Study 2011	(603) 798-4541
Lyndeborough, NH	Firefighter Review 2020	
McGregor Memorial EMS	Executive Director Recruitment 2012, 2018	(603) 312-2052
Middleton, NH	Organization Assessment 2006	(603) 473-5202
Milford, NH	Dispatch Study 2018	(603) 249-0600
Newbury, NH	Organizational Assessment 2006	(603) 763-4940
Newington, NH	Fire Study 2020 Fire Contract Analysis 2020 Fire Services Consulting 2020	(603) 382-4405
Newton, NH	Fire Chief Recruitment 2014	(603) 382-4405
New London, NH	EMS Study 2010	(603) 763-2212
North Hampton, NH	Organizational Assessment 2007	(603) 964-8087
Ossipee, NH	Organizational Assessment 2009	(603) 539-4181
Peterborough, NH	Fire Chief Recruitment 2005	(603) 924-3201
Plaistow, NH	Fire Chief Recruitment 2019	
Rochester, NH	Fire Chief Recruitment 2017, 2021	Blaine Cox, City Manager (603) 332-1167
Rye, NH	Firefighter Backgrounds 2020 Fire Chief Recruitment 2017	(603) 964-5523
Seabrook, NH	Seabrook Fire Department Communications Center Study 2015	(603) 474-3252
Somersworth, NH	Fire Station Review 2018 Interim Fire Chief 2011 Fire Chief Recruitment 2011, 2020	(603) 692-4262
Tilton, NH	Organizational Assessment 2007	(603) 286-4521
Wolfeboro, NH	Fire Chief Recruitment 2016	(603) 569-8161
MARYLAND		
Hagerstown, MD	Community Rescue Services Optimization Study 2014 Organizational Assessment 2013	(301) 733-8042
NEW JERSEY		
Brigantine, NJ	Fire Apparatus Spec. Development 2014	(609) 266-7600

Cranford, NJ	Fire Lt. Promotional Exam and Assessment Ctr. 2013	(908) 276-6203
Hillside, NJ	Organizational Assessment 2011	(908) 352-1700
Longhill, NJ	Fire Study 2018	(908) 647-8000
Princeton, NJ	Fire Study Phases I and II 2016 Fire Study 2014	(609) 497-7632
NEW YORK		
East Marion Fire District	Fire Needs Assessment 2010	(631) 477-0163
Genesee County	Fire EMS Service Model and Strategic Plan 2021	(603) 344.0078 Timothy Yaeger Coordinator Genesee County Emergency Management Services tim.yaeger@co.genesee.ny.us
OHIO		
LION First Responder PPE	Fire Service Cancer Reduction Research 2017	Mark T. Smith Senior Vice President (937) 415-2843
Lion Group, Inc.	Incident Command Research 2017	Steve Schwartz Chief Executive Officer (800) 548-6614
PENNSYLVANIA		
Chambersburg, PA	Fire Chief Recruitment 2006	100 S. 2 nd Street Chambersburg PA 17201
Chester County, PA	Fire EMS Study 2019	Chester County Government Services Center Attn: Veronica Protesto (484) 571-9686
Keystone Valley Regional Fire District	Fire Study 2016	(484) 571-9686
Oxford, PA	Union Fire Company No. 1 Facility, Location, & Long Range Planning 2017	(610) 932-2411 Gregory T. Paxson, President
State College, PA	Fire Director Recruitment 2006	
Upper Merion Township, PA	Fire Study 2015	(610) 205-8554
RHODE ISLAND		
East Greenwich, RI	Fire Chief Recruitment 2018 Interim Fire Chief Recruitment 2017	(401) 886-8600
Jamestown, RI	EMS Services Review 2010	(401) 423-7200
Middletown, RI	Fire Chief Recruitment 2020 SAFER Grant 2020 Interest Arbitration Services 2019	Shawn Brown, Town Administrator

Portsmouth, RI	Fire Department Staffing Study 2012 Fire Chief Recruitment and Assessment Ctr 2012 Organizational Assessment 2013	(401) 683-3255
Warwick, RI	Interest Arbitration Services 2019	
SOUTH CAROLINA		
Aiken, SC	Public Safety Study 2016 Grant Assistance 2016	John C. Klimm, City Manager (803) 642-7654
VERMONT		
Arlington, VT	Fire Study 2020	(802) 375-6680
Ludlow, VT	EMS Study 2019	(802) 228-2841 Scott Murphy, Municipal Manager
Manchester, VT Dorset, VT	Public Safety Consolidation Study 2014	John P. O'Keefe, Town Manager (802) 362-1313 Rob Gaiotti, Town Manager (802) 362-4571, x-3
St. Albans, VT	Fire Department Study 2008	Dominic Cloud, City Manager (802) 524-1500
St. Johnsbury, VT	Fire Mentoring 2020 Fire Study 2020	802-748-3926 Chad Whitehead, Town Manager
Stowe, VT	Fire/EMS Study 2016	(802) 253-7350 Charles Safford, Town Manager
Windsor, VT	Organizational Assessment 2007	(802) 674-6786

PROPOSAL

10



AMB

Ambulance Medical Billing

Your Specialized EMS Billing Partner

Emergency Medical Services Billing
Proposal for the City of Lockport –
Lockport Fire Department
January 17, 2023
2:00 PM



RFP Contact: Jeff Tassi, Director
Director, EMS Partner Solutions
Ambulance Medical Billing

Home Office: 65 Gates Street, South Boston, MA
617.799.7200 direct | jtassi@amb-ems.com

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Confidentiality Statement

The information contained in this proposal and marked as Confidential shall be held in strict confidence for use by the City of Lockport only and shall be used for the purposes of responding to and evaluating this proposal.

Compliance Statement

Ambulance Medical Billing complies with all applicable Federal, State, and local laws and regulations as they apply to the services being provided, including maintaining confidentiality for all medical and patient information in accordance with the Health Insurance Portability and Accountability Act of 1996 (HIPAA).

A: Cover Letter

January 17, 2023

Office of the City Clerk
City Hall
1 Locks Plaza
Lockport, NY 14094

Dear City of Lockport Evaluation Team:

It is our pleasure to submit a bid for Billing and Collection Services to the City of Lockport. I am confident that Ambulance Medical Billing, simply known as AMB, can positively impact Lockport Fire Department's revenue while providing superior service. Delivering the highest level of support to LFD and its community will be our top priority.

AMB has a strong East Coast presence; accounting for more than a third of our 250 EMS clients. This solid network of services allows us to stay on the forefront of trends and issues that may arise in the area. LFD will benefit from working with a well-networked national EMS billing firm who understands the intricacies of ambulance billing, but yet is small enough to be flexible and responsive for LFD and its community. Personable interactions and close working relationships with our clients set us apart from others in the EMS billing segment. Jeff Tassi, our sales director for the region, is located within hours of LFD and is prepared to support the service in any way. There is no question that the combination of our accessibility, knowledge, and understanding of the Eastern market is unmatched.

Joining AMB will open LFD to a level of communication that we are certain is not widely practiced. We specialize in getting to know our partners and working closely throughout the contract. AMB strives to learn and implement new ways of increasing revenue for you, whether that is through technology, staying abreast of new billing and compliance guidelines, or identifying opportunities to improve our processes. Because we are a tight-knit team without layers of management, we are not afraid to make immediate changes that will positively impact your revenue.

Delivering a high quality of service while compliantly capturing the entitled reimbursement for your ambulance crew's performance is our priority. We know this can only be obtained through frequent, proactive communication and establishing a partnership centered on trust. We will maintain strong customer service and open dialog using the following AMB strengths:

- **Direct contact information and mobile numbers** to all levels of executive management (including myself). We understand the 24/7/365 nature of ambulance. You will have our cell phone numbers in order to reach us directly at any time, day or night.



- **A dedicated Client Service Representative (CSR)**, Andria Pugh, will be your consultative ally to address any questions or concerns. Routine meetings/calls between Andria and the LFD team will ensure full transparency of LFD revenue, accounts and any trends or issues observed.
- **A customized client portal with instant dashboards** to view performance metrics. This provides transparency into our billing system and reassures LFD that AMB is meeting and exceeding expectations.
- **Ad-hoc reporting offered in both self-serve and assisted formats** to help identify or analyze any segment of work throughout the claims or billing journey.
- **Web landing page and dedicated Patient Services resources** to improve patient understanding of billing responsibilities. A Patient Services team trained to counsel patients; capable of offering flexible payment options; and skilled in overcoming patient fear and objection through patience and clarity.

Our goal is always to exceed your expectations and we will work hard to achieve this every day. AMB has carefully prepared a tailored proposal and competitive rate options for providing the City of Lockport with exceptional billing and collection services.

I am the individual authorized to make representations and bind AMB. I certify that all of the information contained in the proposal is true and correct. This is a firm offer that is valid for a minimum of 180 days and AMB will comply with the terms of the RFP. I acknowledge all addenda and additional information issued.

You have my personal commitment that our partnership will be a successful one. Thank you for the opportunity to submit this proposal.

Best regards,

Lloyd Ledet
President and CEO
Ambulance Medical Billing (*an operating division of Credit Bureau Systems, Inc.*)
100 Fulton Court, Paducah, Kentucky 42001
Incorporated in Kentucky
270.744.6778 direct | 832.754.8957 mobile | 270.744.8642 fax
lledet@credit-bureau.com | www.amb-ems.com



A Note from Your Regional Director:

I am honored to have the opportunity to submit a proposal to LFD and am the person responsible for answering questions concerning our proposal.

The landscape of ambulance billing has changed over the past couple years. With longtime ambulance billing companies closing their doors and local fire departments discontinuing billing services, to Fire Districts now being allowed to bill for services. As a new service the City has a unique opportunity to find an established billing partner that can truly meet and exceed your revenue cycle needs.

As you review the proposals, you are likely considering each vendor and how they will benefit the City. Here are a few areas where AMB rises above the rest.

Customer Service. AMB's Customer Service is second-to-none. Our proactive approach to customer service is the backbone of our operations. You will be assigned a dedicated Client Services Representative to manage the day-to-day activities of your account and hold regular "touchbase" meetings. Our constant communication with our clients is what makes for successful relationships, as you will always know what is going on with your account at any given time.

Furthermore, as the Northeastern Regional Director of EMS Partner Services, I am located in Boston, Massachusetts, and can be in Lockport easily (plus have a current client in the Buffalo area). I can meet either on a planned schedule (monthly, quarterly, etc.) or when necessary. I have been in the ambulance revenue cycle management industry since 2006, and my passion is helping clients increase revenue and ultimately improve their operations.

Compliant Coding. Other billing companies may have certified coders on staff, but are all of the runs being coded by certified coders? Are they maintaining the level of training or audit processes desirable for claims being submitted to Medicare and Medicaid? Every AMB coder is certified by the National Academy of Ambulance Compliance. They are continuously reviewed on a regular basis to ensure that they have at least a 96% accuracy rate. This level of coding compliance allows us to recoup more ALS dollars that may have previously been missed.

Opportunity for Revenue Increase - Most new clients experience a minimum of an 8-10% increase in revenue as a result of joining AMB. AMB will analyze all of the City's current data to determine where there are areas for improvement, and then set up Key-Performance-Indicators (KPIs) to ensure we are capturing all available revenue, especially as it pertains to public and private insurance payers. With a new service like yours, we would offer the proper guidance and consulting so you may be efficient and maximize your insurance returns

For example, we have been successful in increasing the revenue for the Town of Houlton, Maine since becoming their billing partner in 2020.

I believe that the City of Lockport will benefit from choosing a national firm that specializes exclusively in ambulance billing versus using a local company. The resources and network of connections that AMB has due to our involvement in the industry is unmatched.

Respectfully Submitted,

Jeff Tassi

Regional Sales Director | 65 Gates Street, South Boston, MA 02127 | 617-799-7200



A: Scope of Services

AMB has thoroughly reviewed the Scope of Services from the RFP (Section 3) and is confident in our ability to meet and exceed all of the requirements AMB Approach section of our proposal (beginning on page 28) details how these minimum requirements shall be met and exceeded. Confirmation of our understanding and ability to meet expectations is contained in the table below, which has been modified due to space limitations. In order to reduce redundancy and create simplicity of proposal.

Washington County Scope of Services	
Scope of Services	AMB's Ability to Meet
Contract Terms	Will meet and exceed expectations
Compatibility with City's ESO ePCR	Will meet and exceed expectations
Insurance Requirements	Will meet and exceed expectations
Billing and Collections	
The Contractor will be responsible for providing billing, accounts receivable and delinquent account collection services for the City's Emergency Medical Services (EMS)	Will meet and exceed expectations*
The Contractor will review current EMS billing activities and rate schedules and make recommendations to City on any rate adjustments that may be necessary	Will meet and exceed expectations
The Contractor will use professional trained and fully compliant coders to manually review and code all run	Will meet and exceed expectations
The Contractor shall file initial client billings and customer insurance claims within five (5) working days from receipt of transport information from LFD and shall not have the right to refuse to bill and collect	Will meet and exceed expectations
The Contractor shall obtain any missing data necessary for billing through telephone or e-mail queries from the appropriate source; the ePCR provider, LFD, the receiving hospital, or the patient.	Will meet and exceed expectations

The contractor shall provide a proposed billing and collection procedure including sample bills, letters, notices, language and timelines, and shall work with the City to formalize and implement City authorized billing and collection protocol.	Will meet and exceed expectations
The Contractor shall be responsible for rebilling the insurance company for its portion of a bill if the claim is not paid in accordance with the City's terms.	Will meet and exceed expectations
To obtain prompt payment of accounts the Contractor shall request payment within 30 days.	Will meet and exceed expectations
The Contractor shall agree to implement new fee schedules from time to time as directed by the City.	Will meet and exceed expectations
The Contractor will suspend billing and collection activities as directed By LFD Chief or designee.	Will meet and exceed expectations
The Contractor will be required to bill the patient's secondary and tertiary insurance carriers (if applicable).	Will meet and exceed expectations
The Contractor must be fully compliant with all rules related to all forms of medical billing.	Will meet and exceed expectations
The Contractor will be responsible for timely submittals to Insurance Companies, Medicare and Medicaid.	Will meet and exceed expectations
The Contractor shall be equipped with electronic data submissions capabilities.	
The Contractor shall work with the City staff to implement and maintain procedures which facilitate the demands of RFP	Will meet and exceed expectations
The Contractor will work with the City of Lockport to ensure that all requirements of HIPAA are met.	Will meet and exceed expectations
The Contractor will be required to collect patient signature when necessary	Will meet and exceed expectations**
The Contractor must make every effort possible to make collection within 180 days of initial billing without jeopardizing the goodwill of the City.	Will meet and exceed expectations
Self-pay Patients and payments plans.	Will meet and exceed expectations
Collection of A/R fees.	Will meet and exceed expectations
Medicare billing guidelines.	Will meet and exceed expectations
Medicaid billing guidelines.	Will meet and exceed expectations
Returned mail.	Will meet and exceed expectations
Payment posting.	Will meet and exceed expectations

Compatibility with ESO.	Will meet and exceed expectations
Reports	See Samples Page 48
The Contractor shall be required to submit all the listed monthly reports no later than the 6 th of each month	Will meet and exceed expectations
Additional Requirements	
Record Retention.	Will meet and exceed expectations
Audits and Inspections.	Will meet and exceed expectations
Adherence to Generally Accepted Accounting Principles.	Will meet and exceed expectations
Toll-Free Number.	Will meet and exceed expectations
Customer Service.	Will meet and exceed expectations
Meetings with City and Contractor.	Will meet and exceed expectations
Training	Please see Training Section on page
24/7 Access	Will meet and exceed expectations
Industry Knowledge Sharing.	Will meet and exceed expectations
Data is property of City of Lockport	Will meet and exceed expectations
Indemnification	Will meet and exceed expectations
Contractor Responsibility	Will meet and exceed expectations

* AMB performs an all-encompassing scope of billing and collection services. However, if the City is requiring past due collection activities aka Collection Agency Services, those services will be quoted at a higher fee structure as it is different type of work.

** AMB will assist in obtaining patient signatures when necessary, and will provide the necessary documentation training on signature requirements. However, AMB does not bear responsibility for claims that are unable to be billed when proper signatures are not obtained.



B: Introduction

EXECUTIVE SUMMARY – WHY AMB?

Improved Service and Attention Compared to Others in the Industry: The feedback we receive from clients is consistent: the level of attention and communication from AMB is far better. We aim to keep it simple. AMB has dedicated contacts to streamline the number of touchpoints required for assistance, and direct access to all levels of management.

Improved service is also credited to the additional resources that AMB brings to the City as a national EMS billing firm. A network of clients nationwide allows for a broader understanding of revenue cycle management opportunities. Partnership with the leading EMS law firm, PWW, provides relevant and current information that will ensure that the City's practices and its rate are as current as possible. These are just a few of the resources that AMB will bring to the City.

Quick Implementation: The City will benefit from our expertise with a quick and efficient implementation of 30-45 days. A quick transition will minimize any gaps.

Highly Skilled and Dedicated EMS Billing Personnel: The dedicated members of the LFD team serve as your direct contacts, and they remain ready to assist with every aspect, simple or complex. Jeff, Dana, Andria, and the entire team is looking forward to supporting LFD.

Ambulance Experts: We are not a medical billing firm. We are not a software company or a technology company. We are an *EMS revenue company*. All of our time is devoted to increasing your revenue, reducing your days in A/R, providing opportunities for improvement, and assisting your community. Your revenue maximization and service for your community are our priority ONE.

100% of Coders Certified: Every coder employed by AMB, including those assigned to LFD, are certified by the National Academy of Ambulance Compliance (NAAC) as Certified Ambulance Coders (CACs). Having a staff of certified coders ensures the highest levels of compliance and optimal reimbursement.

Custom Reports at No Extra Cost: AMB has developed an extensive portfolio of custom reports that are presented to LFD on a regular basis. Our Reporting Department has advanced knowledge in creating any additional custom reports at no added charge. Copies of our comprehensive monthly package can be provided at any time. These reports, along with any others that LFD would like us to create, will aid in your EMS operations. Reports are created for you with immediate attention, including a simple method for requesting them...just ask!

Real-Time Dashboards and Web Portal: AMB's State-of-the-Art Technology allows for real-time, simple to use data dashboards. This provides instant access



to agency stats on multiple key performance indicators (KPIs). The dashboard is available online 24/7/365 with any internet connection or smart device using our free App, AMB Dashboard for Clients.

Web portal access is secured and available for authorized LFD personnel. Items included in the Portal are comprehensive month-end reports, daily deposit reconciliation reports, and payment summary.

Hardware Option: AMB assists many of our clients with specialized EMS billing in addition to providing industry-leading hardware for their field crew. The high expense of equipment can be an additional burden on the agency's budget, and our offering makes it simple. The cost of the hardware can be included in the monthly fee that is paid. LFD can choose from an assortment of ruggedized laptop devices that are commonly used by EMS agencies including Panasonic TOUGHBOOK and Getac. Hardware options could be added to the initial contract or during future contract extensions.

Your EMS Specialist: Focusing on EMS billing for 17 years comes with its advantages, and we share that with you. AMB partners with LFD and will work on further developing ways to increase revenue for LFD. Our team of experts doesn't just evaluate your operations at implementation; we are constantly reviewing the health of LFD's account and exploring ways to improve. Our analysis includes reviews of LFD crew members and their strengths and deficiencies. This deep understanding of the source of patient data will lead to an improvement in documentation and ultimately reimbursements.

AMB's superior claims filing experience provides advanced knowledge:

- 17 years of experience exclusively billing ambulance claims;
- 17 years of experience in guidelines, rules, and regulations for federal, state, and local regulations and standards for ambulance billing;
- 17 years of experience in medical insurance filing to include manual and electronic billing methods, with Medicare, Medicaid, private and commercial insurance and
- 17 years of experience in managing, negotiating with, and handling dispute resolution with Medicare, Medicaid and other insurance payors.

PROVIDING COMPREHENSIVE EMS BILLING SERVICES SINCE 2005



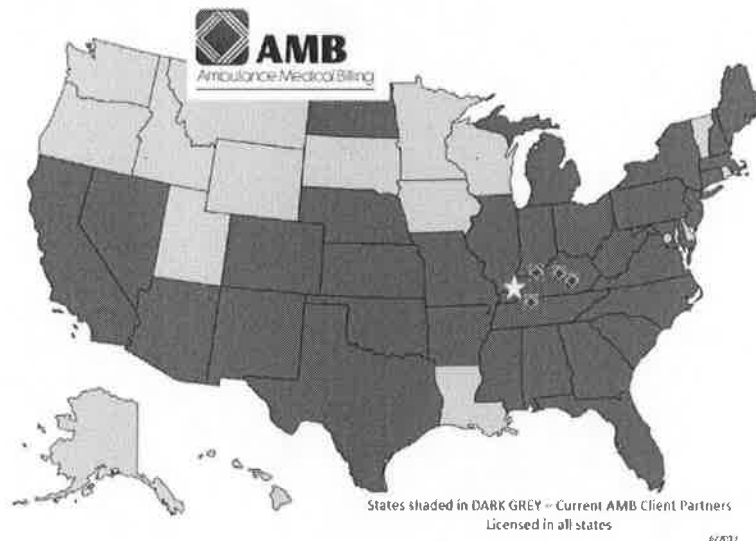
AMB PROFILE

We are a family-owned EMS revenue cycle management company founded 70 years ago with a strong work ethic and hospitality that you can count on. Our AMB division has specialized in emergency medical services billing since 2005 and for nearly 17 years, we've held strong in our commitment to provide superior service and results for you and your community.

Operating on a national level, our headquarters are located in Paducah, Kentucky and is where the LFD account will be worked. AMB has five offices located centrally in the U.S. These locations include four offices in Kentucky: Paducah (headquarters); Lexington; Hazard; and Owensboro; and one office in Clarksville (Nashville area), Tennessee.

Over 250 clients trust us to increase their revenue, provide improvement opportunities, and assist their communities. We are proud that we consistently meet all service deadlines with each of our clients, and always stand willing to go the extra mile for our partners.

AMB is 100% dedicated to EMS transport billing and collection, and currently bills for agencies in 30 states across the U.S. (client states shaded in **DARK GREY** on the map). With the central location of each AMB office, ***we would be proud to add the City of Lockport as a strategic partner.***



AMB's management team consists of an organization which eliminates layers of management, provides improved coordination, and fosters continual communication between the staff members. This allows for easier decision-making among employees and ultimately benefits our clients. If there are



changes that need to be made, our organizational structure allows us to act fast without management red tape and make decisions that will have impact.

We do not subcontract and are not owned by an international company. The protection of your revenue and security of your patient data is of the utmost importance to us and we will not risk the integrity of your account.

AMB has key personnel who oversee each of our highly productive departments. Each manager takes care to ensure the success of LFD's account. AMB is managed by Dana Evans, a talented leader with over 30 years of healthcare, coding, billing and compliance experience.

AMB's team is committed and expertly equipped to manage LFD's claims with all healthcare providers and programs. LFD's claims and denials will be processed according to the timelines as agreed between LFD and AMB.

The seasoned AMB Accounts Receivable (A/R) Managers assigned to your account will be intricately involved with the most efficient and effective methods for how to best work all claims including Medicare, Medicaid, and private insurance. The A/R Managers acquire these skills through hands-on training based on years of billing experience and constant communication from our leadership team. Our in-house AMB Compliance Officer attorney is always available for questions or concerns.

We handle all aspects of your operation including provider credentials with all insurance carriers, interfaces with ESO and the AMB Billing System, review of patient letters and correspondence for approval, and establishment of policies with LFD's guidance.



KEY PERSONNEL

Meet Andria The Locality's Account Specialist



Andria Pugh will be your single point of contact in the office, and she will oversee the Locality's entire account. Andria will address all your questions as quickly as possible, and ensure that we are exceeding your expectations. She will work with the City of Lockport during Implementation; gathering all of the essential documents, including the current rate schedule, to get the City of Lockport account established. Andria will coordinate bi-weekly touch base calls to make sure that everything is going smoothly with your account.

Routine reviews will be scheduled with those appointed by the Locality to conduct reviews of the Locality's account including the rate schedule as compared to other similar services, changes or important highlights in billing procedures, and developments within the healthcare insurance industry. Andria will ensure that all of the Locality's forms and policies, such as hardship cases, are properly implemented. She will schedule any additional meetings as necessary and will involve the appropriate department manager when needed.

Meet Jeff The Locality's Account Representative





Jeff Tassi will be available to the Locality whenever needed. He will keep up with the status of the account and can assist with issues or questions. Jeff will be available for virtual and on-site meetings as requested along with other members of our management team.


Team Resumes


The personnel described on the following pages will be responsible for managing and servicing the Locality's account. AMB will include all officers and key managers in the engagement from pre-contract negotiations throughout the life of the contract. The executive management team directly oversees every detail of the contracting phase, implementation, education and daily account management.

Our AMB staff possess the experience and knowledge required to perform billing for the Locality as required by Maine state rules and CMS regulations.

Name and Title:	<p>Andria Pugh, City of Lockport Client Specialist, Client Services Supervisor</p> <p>Phone: 855-347-1360 ext. 349 Email: apugh@amb-ems.com</p> 				
Responsibilities and Job Tasks:	<p>Dedicated point of contact for the Locality account throughout the entire contract. Responsible for taking care of the account and coordinating assistance from other departments when needed. Manage bi-weekly meetings (or as needed) and schedule on-site visits as necessary. Andria will keep the Locality fully informed.</p>				
<table border="1"> <tr> <td>Years with AMB:</td><td>7</td></tr> </table>	Years with AMB:	7	<table border="1"> <tr> <td>Years of experience:</td><td>13</td></tr> </table>	Years of experience:	13
Years with AMB:	7				
Years of experience:	13				
Experience and education:	<p>Andria Pugh will be your dedicated Client Services Specialist throughout the entire partnership. After joining AMB six years ago, Andria quickly progressed from Data Entry Clerk to Analyst to Supervisor and finally Manager. She then moved to Client Services where she has been since June 2019. Due to her in-depth experience at AMB, Andria is constantly complimented for her billing knowledge and kindness. Andria is there to assist the Locality with any request.</p> <p>As Client Services Supervisor, Andria leads the team of Client Service Specialists and supports them with the tools to provide top-notch service to all AMB clients.</p>				
Other experience and qualifications relevant to this project:	<p>Andria is accustomed to delivering excellent service in any kind of environment. She is determined to seek out answers, even when she might not know at first. She is persistent and dependable, which is respected among the clients that she works with.</p>				


Name and Title:	Jeff Tassi, Director, EMS Partner Solutions Phone: 617-799-7200 Email: jtassi@amb-ems.com 				
Assignment for this project:	Dedicated point of contact for the City of Lockport account throughout the entire contract. Responsible for general oversight of the account and attendance at Locality meetings, virtual and on-site.				
<table border="1"> <tr> <td>Years with AMB:</td><td>6</td></tr> </table>	Years with AMB:	6	<table border="1"> <tr> <td>Years of experience:</td><td>16</td></tr> </table>	Years of experience:	16
Years with AMB:	6				
Years of experience:	16				
Experience and education:	Bachelor's degree from Arizona State University Jeff has over 20 years of sales experience, and has worked in the Ambulance/EMS Revenue Cycle Management industry for over 16 years. This strong sales background helps Jeff connect with his clients and truly understand their needs. Jeff's strong financial knowledge allows him to quickly analyze a service's EMS revenue opportunity and potential.				
Other experience and qualifications relevant to this project:	Jeff has extensive experience in the EMS-Revenue Cycle Management industry and has worked with multiple agencies across many states in achieving their revenue goals. From working with small rural organizations to large Locality services, Jeff has been able to assist clients in creating targeted, personalized solutions relevant to them.				

Name and Title:	Lloyd Ledet, President and CEO Phone: 270-744-6778 direct Email: lledet@credit-bureau.com 				
Responsibilities and Job Tasks:	Lloyd is responsible for the general success of LFD's contract, and the oversight of the organization and executive management team. It is not uncommon for Lloyd to reach out personally; reinforcing the strong partnership that makes AMB unique.				
<table border="1"> <tr> <td>Years with AMB:</td><td>5</td></tr> </table>	Years with AMB:	5	<table border="1"> <tr> <td>Years of experience:</td><td>34</td></tr> </table>	Years of experience:	34
Years with AMB:	5				
Years of experience:	34				
Experience and education:	Prior to joining CBS, Mr. Ledet contracted with the Commonwealth of Massachusetts to outsource two call centers for The Massachusetts Health Connector Insurance Exchange. This project employed 250 agents providing insurance enrollment, support, and payment assistance for State citizens year-round (including three consecutive open enrollment periods). He co-managed the project with Dell Healthcare and Public Consulting Group as partners. He concurrently managed nearshore facilities for his former employer in Costa Rica employing 350 dedicated bilingual customer service agents for companies ranging from Dyson Technology to Nielsen Market Ratings.				
Active registrations memberships or certifications:	Our firm is a member of several associations and organizations within the EMS industry.				
Other experience and qualifications relevant to this project:	Lloyd leads AMB in supporting over 250 services, mostly public, in 30 states throughout the US. He is a 34-year veteran of the Healthcare Revenue Cycle Management (RCM) industry with concentrated experience in Accounts Receivable Management and Business Process Outsourcing. He has a vested interest in the success of LFD's project.				


Name and Title:	Michael Lavender, CPA – Chief Financial Officer Phone: 270-744-8139 direct Email: mlavender@credit-bureau.com 
Responsibilities and Job Tasks:	Michael is responsible for the financial success of LFD's account. Michael has conducted a full analysis based on the financial information provided for the RFP and will continue to monitor the account for success and/or trends that need prompt attention.
Years with AMB:	Years of experience:
1	16
Experience and education:	<p>Mr. Lavender joined CBS and AMB as Chief Financial Officer in December 2019. Prior to AMB, Mr. Lavender was an audit manager with Crowe LLP, one of the nation's leading public accounting, consulting, and technology firms. Mr. Lavender is a CPA, a member of the American Institute of Certified Public Accountants, and holds an active license in Kentucky and Tennessee.</p> <p>Michael has been appointed as an advisor for the National Academy of Ambulance Coding (NAAC) Financial Officer Project. As a financial officer with EMS-specific experience, Michael provides NAAC with insight and valuable guidance.</p> <p>Mr. Lavender's prior experience includes, but is not limited to, audits of public and privately held companies, not-for-profit universities and municipalities, and private equity investment firms; acquisition accounting, buy/sell side due diligence; business continuity planning; auditing internal controls and implementation of best practices based on industry standards; and performing cost audits to help organizations achieve greater profitability. Mr. Lavender has seven plus years' experience in the EMS billing and RCM industry, and is well versed in accounting standards as they pertain to the ever-changing landscape in each respective industry.</p>





Active registrations memberships or certifications:	Certified Public Accountant (CPA) NAAC Financial Officer Project
Other experience and qualifications relevant to this project:	At CBS and AMB, Michael is responsible for the financial and accounting oversight of all operating divisions, investment analysis, and risk identification and mitigation


Name and Title:	Dana Evans, Managing Director Phone: 855-347-1360 ext. 560 Email: devans@amb-ems.com 
Responsibilities and Job Tasks:	Provide executive leadership for the success of the LFD account; overall management of operations according to the contract and ensure productivity and performance measures are met and exceeded.
Years with AMB:	Years of experience:
25	30
Experience and education:	Education: Accounting and Computer Science Dana has over 30 years of experience in Ambulance, Hospital and Physician Billing. She is active in HBMA and several industry associations. Dana attended college majoring in Accounting and Computer Science. She started her healthcare career in a local physical/occupational therapy practice and joined AMB in 1996. For 25 years, she has built a reputation on dedication to the task and attention to detail while managing various functional areas including: practice management, revenue cycle management, and software documentation.
Active registrations memberships or certifications:	Certified Ambulance Coder (CAC) Certified Ambulance Documentation Specialist (CADS)
Other experience and qualifications relevant to this project:	Dana was recently promoted to the role of Managing Director. Her expertise, dedication, and firsthand knowledge of the entire AMB operation allows her to lead our talented team to achieve at the highest levels.




Name and Title:	Rachel Leigh, JD – Chief Compliance Officer Phone: 270-744-9000 ext. 270 Email: rleigh@credit-bureau.com 				
Responsibilities and Job Tasks:	HIPAA Compliance Officer. Rachel will ensure the highest level of compliance for LFD's account.				
<table border="1"> <tr> <td>Years with AMB:</td> <td>5</td> </tr> </table>	Years with AMB:	5	<table border="1"> <tr> <td>Years of experience:</td> <td>15</td> </tr> </table>	Years of experience:	15
Years with AMB:	5				
Years of experience:	15				
Experience and education:	Rachel Leigh, JD has overseen Compliance for all divisions at Credit Bureau Systems for five years. She holds multiple degrees including a Juris Doctorate and Certified Ambulance Compliance Officer (CACO). She is active in Healthcare Financial Management Association (HFMA), American Collector's Association (ACA), and IA Compliance Professionals. Her department provides HIPAA training/testing, corporate policy training, EMS user telephone monitoring, biller/collector certifications plus internal and external audit support. Rachel conducts monthly reviews against the OIG Exclusion Database of all AMB employees and Board members to ensure compliance with the list and Medicare claim submission regulations.				
Active registrations memberships or certifications:	Juris Doctor (JD) Certified Ambulance Compliance Officer (CACO)				
Other experience and qualifications relevant to this project:	She will oversee the implementation electronic storage of all patient medical information and its proper security; a comprehensive HIPAA compliance plan consistent with the US OIG Compliance Program Guidance for Third Party Medical Billing companies; compliance with all rules and regulations such as the Fair and Accurate Credit Transactions Act, Red Flags Rule, coding, separation of duties, annual maintenance of AMB's SSAE 16 audit, and the annual billing compliance audit for LFD.				

Name and Title:	Gary Lee, Chief Information Officer Phone: 270-744-8138 direct Email: glee@credit-bureau.com 
Responsibilities and Job Tasks:	Responsible for overall maintenance of all IT functions.
Years with AMB: 11	Years of experience: 36
Experience and education:	Gary joined CBS in 2009. He is responsible for all IT functions for Credit Bureau Systems' divisions, including AMB, MARS (our physician billing division) and US Coding. He has over 36 years of experience in the Information Technology field and proven expertise in research, development, management and implementation of cost-effective solutions in large, complex IT infrastructures. He is knowledgeable in many facets of computer and network operations including WAN/LAN network design and implementation, security (internal/external), developing policies and procedures, disaster recovery, technology research, Data Center construction and operation, and building effective relationships with vendors and customers. Gary holds a BA degree in Engineering Physics and Computer Science.
Other experience and qualifications relevant to this project:	Gary will oversee the data retention policies and disaster recovery contingencies for LFD's account.

Name and Title:	<p>Stacy Myers, Patient Services, System Administration, Insurance Processing, Reporting & Collections Manager</p> <p>Phone: 855-347-1360 ext. 446 Email: smyers@amb-ems.com</p> 
Responsibilities and Job Tasks:	<p>System Administration, Insurance Processing, Reporting and Collections. Stacy manages our team of Patient Services Representatives who take care of all patient communication and requests.</p>
Years with AMB:	Years of experience:
12 Experience and education:	<p>21</p> <p>Stacy's Insurance and Billing industry experience of over 21 years is a significant benefit to the clients and AMB employees that she works with. She started her insurance career with LYNX Services and was quickly promoted into management. From there, Stacy sold insurance policies and managed a branch of American General and Combined Insurance. With a solid background in insurance processing, Stacy joined the AMB team in 2008. She has been promoted into numerous roles throughout our A/R Department, and currently manages our Systems Administration, Insurance Processing, Reporting, and Collections departments. Stacy is known for her high level of detail and responsiveness. Her departments handle a large volume of workload, particularly during month end, and it is always done with professionalism.</p>
Other experience and qualifications relevant to this project:	<p>Under Stacy's leadership, our AMB team of analysts will provide prompt reporting to LFD along with a smooth implementation and support of collection accounts.</p>

Name and Title:	Nichole Daniel, Accounts Receivable Manager Phone: 855-347-1360 ext. 3102 Email: ndaniel@amb-ems.com 				
Responsibilities and Job Tasks:	Maximization of LFD's accounts receivable. Nichole is responsible for managing LFD's team of Account Receivable specialists who continually follow-up on LFD's claims, work denials and appeals and ensure that the highest level of reimbursement is obtained.				
<table border="1"> <tr> <td>Years with AMB:</td><td>7</td></tr> </table>	Years with AMB:	7	<table border="1"> <tr> <td>Years of experience:</td><td>17</td></tr> </table>	Years of experience:	17
Years with AMB:	7				
Years of experience:	17				
Experience and education:	Nichole has over 17 years of experience in the healthcare industry. Her career began as an insurance billing specialist for a local hospital and she quickly moved into a supervisor role. Since commencing her employment with AMB, Nichole has worked as the Manager of Insurance Processing. Her leadership and drive were quickly recognized and she moved into the challenging role of A/R Manager, where she excels in assisting our clients achieve increased revenue.				
Other experience and qualifications relevant to this project:	Nichole's attention to detail empowers her to lead the A/R team in achieving the highest results for LFD.				

Name and Title:	Heather Jeffrey, Coding Manager Phone: 270-519-9845 direct Email: hjeffrey@uscoding.com 
Responsibilities and Job Tasks:	Coding Manager for LFD's account. Heather is responsible for ensuring that all of LFD's claims are coded accurately and at the highest reimbursement possible.
Years with AMB:	Years of experience:
5	20
Experience and education:	Heather started her career with AMB as a coder in March of 2015. By 2018, Heather was promoted to the role of Coding Manager with the primary responsibility of directing our US-based coding team. She is a Certified Ambulance Coder (CAC) and a Certified Ambulance Documentation Specialist (CADS). Prior to joining AMB, Heather worked at a local physician's office and was a certified EMT. Heather has a degree in Health Sciences.
Active registrations memberships or certifications:	Certified Ambulance Coder (CAC) Certified Ambulance Documentation Specialist (CADS) Former EMT
Other experience and qualifications relevant to this project:	Heather's practical knowledge is an asset to our coding team. Heather and the coders that she manages will provide compliant coding that maximizes LFD's revenues.

AMB Industry Involvement

We take pride in the EMS industry associations, certifications and affiliations that our Executive Management and key personnel represent:

- National Academy of Ambulance Coding (NAAC) – 13-year member
 - Better Business Bureau – 11-year member
 - **A+ Rating**
 - Medicare Contracted Advisory Committee (MCAC)
 - American Ambulance Association (AAA)
 - Certified Ambulance Coder (CAC)
 - Certified Professional Coder (CPC)
 - Certified Ambulance Compliance Officer (CACO)
 - Certified Ambulance Documentation Specialist (CADS)
 - Certified Ambulance Privacy Officer (CAPO)
 - Certified Professional Compliance Officer (CPCO)
 - American Collector's Association (ACA)
 - American Academy of Professional Coders (AAPC)
 - IA Compliance Professionals
 - State and National Certified EMT; State and National Certified Paramedic
 - Healthcare Billing and Management Association (HBMA) – 25-year member*
 - Healthcare Financial Management Association (HFMA) – 25-year member*
 - SAS 70 / SSAE 18 / SOC 1 Type II Accreditation
 - Page, Wolfberg and Wirth (PWW) EMS law firm
 - Medical Compliance Services, Inc., EMS compliance consulting firm
- *Membership through CBS



Outside Consultants

AMB utilizes the following industry leaders for specialized, outside third-party audits. These audits are an additional layer of security to ensure our team is operating compliantly and within payor rules.

- Page, Wolfberg and Wirth (PWW) - EMS law firm
- Medical Compliance Services, Inc. – EMS Compliance consulting



Subcontractors

We do not subcontract and we are not owned by an international company. We won't compromise your revenue or the security of your patients' data by outsourcing or sending the information overseas.

Contact Information

AMB PERSONNEL CONTACT INFORMATION

In addition to access during the workday, the City of Lockport personnel will have the mobile phone numbers for our Managing Director, CEO, and several other key AMB managers for around-the-clock access. We understand that EMS operates 24 hours a day, seven days a week, and we are committed to assist whenever we are needed.

AMB Contact Information		
AMB Personnel	Phone	Email
Jeff Tassi, Account Representative	617-799-7200	jtassi@amb-ems.com
Andria Pugh, Dedicated LFD Account Specialist	855-347-1360 ext. 349	apugh@amb-ems.com
Lloyd Ledet, President and CEO	270-744-6778	lledet@credit-bureau.com
Michael Lavender, CPA – Chief Financial Officer	270-744-8139 direct	mlavender@credit-bureau.com
Dana Evans, Managing Director	855-347-1360 ext. 560	devans@amb-ems.com
Rachel Leigh, JD – Chief Compliance Officer	270-744-9000 ext. 270	rleigh@credit-bureau.com
Gary Lee, Chief Information Officer	270-744-8138 direct	glee@credit-bureau.com
Stacy Myers, Patient Services, System Administration, Insurance Processing, Reporting & Collections	855-347-1360 ext. 446	smyers@amb-ems.com
Nichole Daniel, Accounts Receivable Manager	855-347-1360 ext. 3102	ndaniel@amb-ems.com
Heather Jeffrey, Coding Manager	270-519-9845 direct	hjeffrey@uscoding.com

D: AMB's Approach

AMB BILLING SYSTEM AND ESO INTEGRATION BILLING PROCESS



AMB is a Platinum partner with ESO as nearly 80% of our clients use ESO for patient care reporting. AMB has partnered with ESO for over 15 years. As a Platinum ESO Partner, the AMB Billing/ESO interface platform and billing are key to improving the quality of your patient care data and ease of use for your crew. Choosing AMB will assure that you are working with an experienced vendor possessing the essential tools to optimize your revenue.

An important highlight: No other vendor's billing system will integrate as effectively because our AMB Billing system is also an ESO product. This correlates to guaranteed integration from the ESO ePCR to the ESO/AMB Billing system. No missing runs and no missing patient data.

Our AMB Billing System is a fully functioning billing software product that has 100% compatibility with the ESO ePCR; eliminating the risk of losing data and providing a streamlined interface. AMB will have complete electronic access to the ePCR and the patient care records.

The billing system integrates seamlessly with ESO to import, receive, and process the patient care report, and perform the necessary billing and collections processes for documentation, tracking and reporting the progress of all claims for your account. Authorized LFD personnel will be granted access to our system online. The web-based, electronic access for LFD mirrors that of AMB personnel and *LFD will have the ability 24 hours per day, 7 days a week* to view and edit patient information required to successfully process accounts and communicate with AMB team members on specific accounts. This communication technique is unique to AMB and has provided great success for the billing process.

The software is updated on a regular basis, typically after-hours in an effort to minimize the disruption of work. Hands-on training will be performed at the beginning of the contract, and on an as-needed basis for your staff and crew members. While we will supply LFD with any and all reports, including any custom

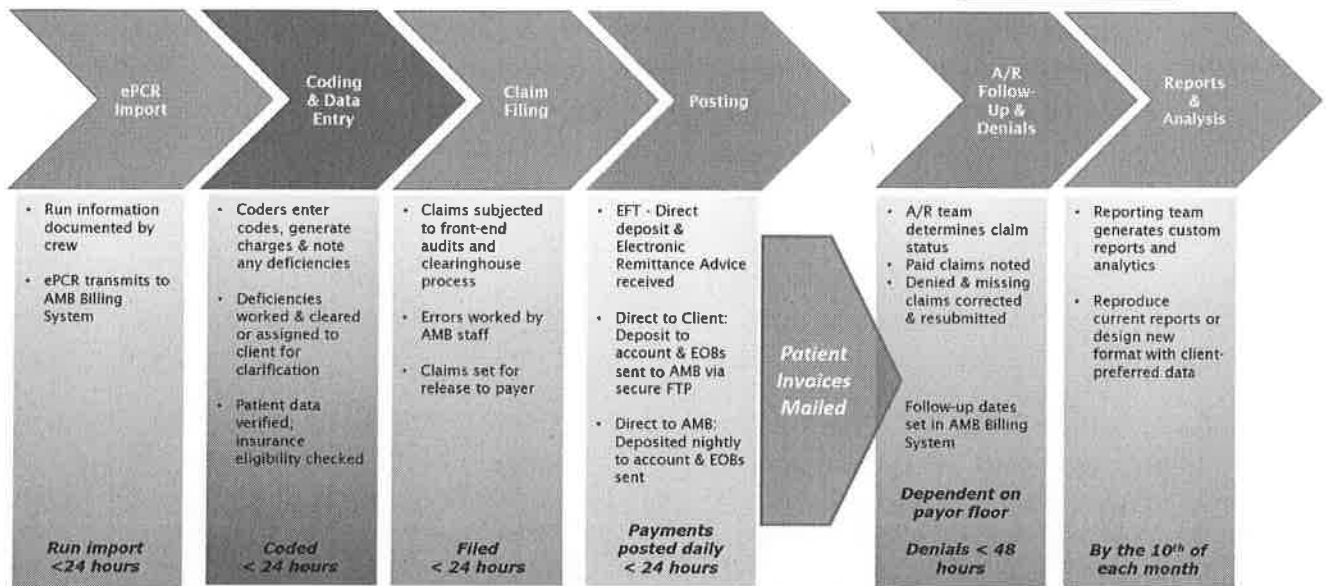


report requests, having direct access to this user-friendly system by your authorized personnel will allow the ability for instant viewing of specific accounts and reports. You will be able to review a patient account directly to analyze all billing activity to date or run a report on a specific item. We are always happy to assist in obtaining any information you may need as well as provide feedback and explanation on all data. Each step of the process is documented and tracked in our AMB Billing System with full reporting capability.

There is no special software or hardware required to access our system. A computer operating Windows and an internet connection are sufficient.

We have perfected our billing system to ensure that it successfully integrates with the ESO ePCR and transforms your runs into claims. Our processes and procedures are the reason why we are the billing choice for LFD. AMB is able to accept electronic files with ESO patient records via secured email link. Our professional and HIPAA-trained staff will ensure the appropriate transmission and processing of the files, and you will be notified of all changes or modifications.





BILLING PROCESS

Data/Charge Entry Process

This process includes coding, patient demographic verification, and insurance eligibility verification. The time that the run imports to AMB to the time that it is sent to the Waystar clearinghouse is typically 48 to 72 hours. This timeline applies to runs sent to AMB with all the proper billing information.

Coding and Certified Ambulance Coders



Our certified coders will receive the imported runs within 24 hours. The incidents are coded applying the LFD rate schedule, charges are generated, and any deficiencies are noted in validating proper documentation and medical necessity.

A report is generated monthly regarding the accuracy and efficiency of the run documentation. We have included a sample of our Deficiency Runs Report with the sample reports in the Statistical Reporting section.

All of our EMS coders hold Certified Ambulance Coder certification through the National Academy of Ambulance Compliance (NAAC). AMB coders are not only part of local communities but are up-to-date on the latest EMS billing standards



including specific Maine policies, insurance payor regulations, documentation guidelines and best coding practices.

We will assign a dedicated team of coders to LFD's account; utilizing a high standard of metrics and audits so coding outputs are accurate and within acceptable quality standards. AMB upholds compliant coding by requiring each coder to maintain an accuracy rate of 96% or higher.

AMB can conduct a documentation and coding review on your previous records in order to ascertain where improvements can be made. If necessary, detailed documentation training is provided to your EMS staff. A review of your current charge master in comparison to other regional, state, and national averages could uncover untapped revenue potential. Consultation services include regarding assistance in obtaining patient signatures and PCS forms after transport. Documentation reviews can be provided on a quarterly or otherwise agreed upon schedule throughout the contract.

Claim Submission Preparation

AMB will obtain all the required approvals and reviews required for claim submission. We will work with LFD when additional information is needed, and AMB will provide training to crew and staff on pre-billing functions, documentation and the AMB Billing system.

Verification of Patient Demographic Information

AMB will maintain relationships with hospital personnel for the data exchange process in order to obtain electronic facesheets. This exchange helps assist the pre-billing process in obtaining any necessary insurance or demographic information that may not have been originally obtained.

The relationship with the hospital is important to AMB as it allows us to gather additional information while not interrupting the patient or their family. This data verification, in turn, results in a higher rate of timely clean claim submissions.





AMB utilizes Passport Health, an industry leader in insurance discovery, to verify insurance. This system is healthcare specific with industry expertise in Emergency Medical Services. Healthcare provider revenue is increased by delivering actionable data and workflow for maximum reimbursement and patient balance resolution. The insurance discovery system is utilized daily by our team members to provide validated coverage information for claims being imported to AMB.

While our first preference is to utilize run reports or hospital facesheets, AMB also uses this software to scrub for all missing, partial or incorrect patient addresses and phone numbers. Correct demographic information is important not only for patient mail and account follow-up, but also for claim submission so insurance carriers can assign the claim to the correct patient and adjudicate the claim based upon the correct insurance plan.

By ensuring the scrubbing process is automated within AMB, we validate information quickly and submit claims to carriers in a timely manner. This, in turn, allows for expedited reimbursement and removes the possibility of account write-offs due to timely filing denials.

At times, it is difficult to obtain the patient or patient representative's signature for insurance billing at the time of treatment. AMB has a well-defined process in place to address this. If a patient signature is identified as missing, AMB has created a form with verbiage that allows a "lifetime signature" to be maintained on file. This form is produced daily and is sent to the patient. Once returned, receipt of the form is documented in the patient's account for current and future runs. After the form is generated, AMB places a note on the account indicating that a "Signature Letter" was sent to the patient. If a signed signature letter is not returned within 21 days of letter generation, AMB will send a statement to the patient. If needed, we will contact the patient via telephone to follow up on the return of the signature letter.

At any time, if new or additional information is received on a run, the run will be prepped and submitted/re-submitted.



Electronic Filing of Claims

AMB uses the top-rated Waystar clearinghouse, a third-party vendor, that allows for the HIPAA-compliant, electronic filing of your claims to include Medicare, Blue Cross Blue Shield and other insurance plans. We have found great success with our clearinghouse as they guarantee that they will have updated payer edits in place, per State, at all times. This assurance allows for more clean claims to be submitted initially, which decreases back-end denials and delays in reimbursement.



All claims are filtered through State-specific rules that include payer-defined requirements. This allows us to minimize denials on the backend. Through our clearinghouse, we have been able to increase revenue while decreasing days in A/R. AMB files batches of claims to Medicare, Medicaid, and all Commercial Insurance Agencies. *AMB submits claims to the payer within 24 hours of data receipt* to allow for prompt and accurate payment by the payer. When electronic submission is not possible, AMB will manually submit claims as needed.

Billing and Insurance Updates

Putting LFD and its patients first is paramount to our operations because you are not just our client; you are our partner. This is achieved through strong communication, and our communication is second-to-none. We do not have multiple layers of management that make it difficult to reach us. In fact, you will have direct phone numbers to reach any member of our executive team, including their mobile numbers. We understand that the ambulance industry is 24/7/365 and we are here to assist you, day or night. Our team will be available to meet virtually or in-person as often as LFD would like, and we look forward to scheduling on-site meetings throughout the year to discuss the account and solidify our partnership.

AMB takes a proactive approach in knowledge-sharing. We update our clients on upcoming payer rule changes, requirements, trends, issues and system changes as soon as we are notified. We believe that open communication and transparency are key to a successful partnership. This communication comes in all forms ranging from email blasts targeting all clients, individual emails, phone calls, newsletters, regular touch-base meetings, monthly and annual reviews, text messages and lastly through our client portal.



AMB partners with EMS attorney and industry leader Chris Kelly, with the EMS firm PWW, to offer quarterly webinars to our clients. These webinars target identified trends, such as medical necessity, ALS assessment documentation, or developments in EMS covering the COVID-19 pandemic, ET3 and Cost Data Reporting. A recent webinar discussed funding available for EMS agencies in response to the pandemic; how to report costs; how to document ePCRs in relation to suspected or confirmed COVID-19 patients; and reimbursement.

Accounts Receivable Process

The LFD accounts will be classified by type: Medicare, Medicaid, commercial, self-pay, etc., to include separate classifications per payor. Transactions are posted on a daily basis to ensure accuracy. The A/R follow-up process includes claims that have had no response from the insurance payor within a 45-to-60-day period from initial claim submission, depending on the insurance carrier. Reports are run weekly for claims that fall within these limits and status. AMB's dedicated team works these accounts to ensure the claims are on file with the appropriate payer and are paid in a timely manner, including self-pay teams.

Denial Management / Rejected Claims Process

Denial assignments are determined in our Billing System as a result of the denial code from the explanation of benefits (EOB). Our Denial Management team determines the appropriate action:

- The claim needs correction and resubmission;
- Additional information is needed from the payer regarding the denial; or
- Additional information is needed from LFD for the claim

Our team works, corrects, and re-bills denied or rejected claims on a priority basis. Once the denial is posted to the account, it is entered into the A/R Team's denial workflow. This workflow is continuously monitored and worked daily by LFD's specifically dedicated AMB team. We utilize our CAC certified coders, telephone calls to the insurance carrier, insurance carrier web portals, and information from LFD to correct and re-bill the claims. Denials received are worked and resubmitted within a 48-hour timeframe. Medicare claims are also worked as a priority within the denial team. AMB utilizes all MAC sites to help aid in the prompt refiling and proper correction of denied claims.

Posting and Treasury Process

A full understanding of the Posting requirements will be discussed upon implementation. AMB will make any necessary accommodations to fit the needs of LFD.

Payments and denials are posted immediately upon receipt. Our dedicated team will conduct bank account reconciliations on a daily basis. This is a control that AMB has established to verify every transaction that occurs. Contractual write-offs will be promptly posted and categorized according to type.

Our Posting and Treasury process includes the receipt, batching, and deposit of lockbox payments, as well as the posting of any denied (no-pay) claims. AMB has the capability to receive and process funds from many different resources. The main payment resources are EFT (electronic funds transfer), paper checks mailed directly to LFD, and paper checks mailed directly to AMB. Regardless of the fund type, payments are pulled daily from all resource areas, batched, and forwarded to the payment posting team to enter onto the individual patient's account. All funds received must be posted within 24 hours of receipt. Any paper checks received at AMB are deposited and swept to LFD bank account daily.

Reports will include deposits through the last day of the month. Our month-end reports are not generated until after the month has been closed within our system. All reports will include all payments posted during each business day of that reported month. On the last business day of the month, LFD will report deposits to AMB in order to have the deposit(s) batched and posted on that same day.

Reconciliation Process

LFD's account will be promptly reconciled each month. This means that at each month end, the dollar amount on AMB's reports reconciles to all deposits made to LFD bank account during the month. Fees charged by AMB will be based upon net cash collections. Payments will be separated and categorized depending on the source so you can see what was received from AMB, your former billing vendor, or a designated collection agency.

Patient Refunds

When a credit balance or overpayment is identified on an account, AMB will review the account to validate that a payment refund is needed, to whom the refund is due, and the circumstances which created the credit. We will provide a refund packet to LFD which contains our findings, as well as the specific account information including patient name, run number, and date of service.

The packet will detail the action needed in order to resolve the credit balance. For example, it will detail whether a physical check is needed to distribute the refund, or whether a request can be sent for a payor to offset the credit balance from future payments owed to LFD.

AMB offers two different options for completing refunds. The first option is for AMB to handle the repayment of all refunds to the insurance carrier and/or patient. AMB will send an invoice for the total amount of refunds to be issued and LFD will remit a check directly to AMB. After receiving the check from LFD, AMB will initiate the refunds to the appropriate payee. The second option is for LFD to handle the repayment of all refunds directly to the insurance carrier and/or patient. AMB will provide the refund packet to LFD, including all of the information referenced above and LFD will initiate the refunds to the appropriate payee. LFD will then advise AMB once the refunds have been completed so we can update each account with the action taken.

AMB will assist with any questions that arise and will be available for regular calls, typically conducted monthly, to review the refund packets with the authorized LFD representative.

Write-offs, Hardships and Collections

Hardship adjustments and the establishment of payment plans will be taken on accounts at the direction of LFD. Accounts will be applied accordingly or when contractually required or dictated by law. A monthly report of all collection activity will be provided, including a report of any outstanding claims with no