

Whitehall Associates, Inc.

"A Veteran Owned Company"

65 Fayson Lakes Road
Kinnelon, New Jersey 07405-3129

www.whitehallnj.com

Joseph Richardson, PhD

973-838-7823

E-MAIL: contact@whitehallnj.com

March 12, 2019

E-MAILED TO: okas@franklinlakes.k12.nj.us

Mr. Michael Solokas
Business Administrator/Board Secretary
Three Town School District
490 Pulis Avenue
Franklin Lakes, NJ 07417-1324

Dear Mr. Solokas:

In response to your request, Whitehall Associates is pleased to submit its quotation for the preparation of a Demographic Study for the Franklin Lakes School District.

This document is a multi-faceted presentation of services which includes the following content sections:

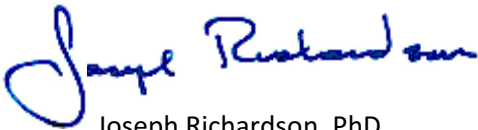
- Part 1: Firm Brochure and References
- Part 2: Scope of Work
- Part 3: Responsibility of the District
- Part 4: Fee Proposal
- Part 5: Project Team Information
- Part 6: IRS Form W-9
- Part 7: Business Registration Certificate
Certificate of Employee Information Report
- Part 8: Certificate of Insurance

Our presentation consists of a successful and well experienced team from our firm. This team has worked with small one school rural districts, moderate sized suburban districts, and large urban districts.

Our firm prides itself on looking forward to a long term relationship with our clients. Our goal is to provide continuous, comprehensive, and professional services to our client school districts. Please review our web site at www.whitehallnj.com.

Please call if you have any questions.

Sincerely,
WHITEHALL ASSOCIATES, INC.



Joseph Richardson, PhD
President

enc

Whitehall Associates, Inc.

65 Fayson Lakes Road
Kinnelon, New Jersey 07405-3129

973-838-7823

www.whitehallnj.com

FAX: 973-838-0238

Educational Facilities Planning Consultants

Whitehall Associates, Inc. was established in 1986 and is the foremost supplier of professional services to New Jersey public school districts. The professionals that comprise Whitehall Associates are highly qualified in their respective fields and dedicated to the premise that we must provide the finest possible education facilities for our children.

Enrollment projections are key in the planning process for any school. However, projecting school enrollments is subject to many variables that can change those apparent trends. Whitehall Associates, Inc. has prepared demographic studies for over 300 school districts in New Jersey.

Whitehall Associates, Inc. has worked with over 40 architectural/engineering firms in New Jersey in preparing demographics and/or educational specifications for over one billion dollars in school construction.

Whitehall Associates, Inc. works with the New Jersey Department of Education, architects, and bond counsel in assisting districts through the process of facilities construction approvals. The individual one page résumé of the principal team members are attached.

Our guideline is that we are not happy until you are happy. Our satisfied clients will attest to that fact. Please consult our website at whitehallnj.com for additional information.

REFERENCES: (Additional references available on request)

William Doering
Business Administrator
Toms River Regional School District
1144 Hooper Avenue
Toms River, NJ 08753-8361
732-505-5524

L. Douglas Pechanec
Business Administrator/Board Secretary
West Morris Regional High School District
10 South Four Bridges Road
Chester, NJ 07930-2037
908-879-6404 ext 1007

Theresa Linskey
Business Administrator/Board Secretary
Branchburg Township School District
240 Baird Road
Branchburg, NJ 08876-4200
908-722-3335 ext 4740

William Moffitt
Business Administrator/Board Secretary
Wayne Board of Education
50 Nellis Drive
Wayne, NJ 07470-3555
973-633-3006

Paul Roth
Business Administrator/Board Secretary
South Orange Maplewood Board of Education
525 Academy Street
Maplewood, NJ 07040-1311
973-762-5600 ext 1801

John Scavelli, Jr.
Superintendent
Evesham Township School District
25 South Maple Avenue
Marlton, NJ 08053-2001
856-983-1800

SCOPE OF WORK

It is understood that the Franklin Lakes School District is interested in having a demographic study prepared. We use as a base for the demographic study the cohort survival method of population projection. This method is standard and is fully acceptable by the New Jersey Department of Education (NJDOE). These base projections are modified by the impact of planned and approved residential development, changes in the academic program, and any other factor that would have an impact on the number of students in the district.

We use the enrollment figures as of each October from NJSMART. Birth figures are obtained from the New Jersey Department of Health. Planned, approved, and pending residential development data are obtained from the local Planning Board.

Whitehall's typical demographic study consists of a set of easy to understand tables and an accompanying narrative. Each district has its own characteristics, therefore, each report is different to a great extent. The general explanations may remain the same. Shown below is a typical synopsis of the tables.

DECENNIAL POPULATION - tabulates the decennial population of the municipality since 1930. An analysis is contained in the narrative.

TABLE 1 is the pre-school data, both the "universe" and actual, as required by the NJDOE.

TABLE 2 is the district's enrollment history wherein the survival ratios are developed. This table accommodates the NJDOE electronic forms and can be used with ease.

TABLE 3 projects the student enrollment for the next five years and also follows the general format of the NJDOE worksheets. It is the main table and is designed to be used in conferences and meetings. It allows the participant to be able to refer to one page rather than searching through a document for more information. The back-up for Table 3 entries are found in the other tables. All calculations are carried to eight or more decimal places. Since there cannot be fractions of a student, the district totals may vary by one or two students if added manually.

Table 3 also displays the live births attributed to the municipality for the five years prior to the kindergarten year shown. A dashed boxed area to the lower left of the table is an area of low confidence in that these children have either not been born or reported. By convention these births may be shown as a regression, an average of the last eight year's births or the last known birth figure.

A line labeled "Net Development Impact" is used when there is a residential development impact in the district. All the residential developments are listed in Table 4. Since there is no way to accurately determine the date of occupancy of these developments, they are listed as an aggregated line item and added to the final year's projected enrollment.

TABLE 4 shows all the planned, approved and proposed residential developments within the Franklin Lakes School District and their individual impact. Since each development is a relatively small sample, the aggregate anticipated student population is used to determine the by grade impact used in Table 3.

TABLE 5 is the student enrollment projection by grade, by school, five years hence.

RESPONSIBILITY OF THE SCHOOL DISTRICT

The school district will make administrators and staff (as required) available to the consultants at mutually agreeable times.

The school district will provide relevant data and documents in possession of the district to the consultants upon request, free of cost.

To prepare the demographic report for your district we need to have your October 15, 2018 enrollments submitted to us on the attached form using the following protocol which was prepared in conjunction with the NJDOE Data Center:

1. Use the **NJSMA**RT** Program Type Codes (PTC)** to get the enrollments

NJSMA RT		NJSMA RT	
GRADE LEVEL	PROGRAM TYPE CODE	GRADE LEVEL	PROGRAM TYPE CODE
Pre-Kindergarten	3H, 3F, 4H, 4F, 5H, 5F	Grade 7	07
Kindergarten	KH, KF	Grade 8	08
Grade 1	01	Grade 9	09
Grade 2	02	Grade 10	10
Grade 3	03	Grade 11	11
Grade 4	04	Grade 12	12
Grade 5	05	UNGRADED	18 THRU 33
Grade 6	06		

2. All students attending in-district schools, coded as attending, are to be shown (i.e. tuition students, etc.).
3. Part-time students should be reported as whole numbers. The NJDOE Data Office reduces these to half for their reasons. The NJDOE Facilities Office needs the whole number.
4. Out of district placements, in any category, are not to be shown.
5. To obtain the number of **UNGRADED** students from NJSMA**RT**:
 - a. Go to the **"State ID Management"** tab.
 - b. Click on **"SID Management"**.
 - c. Go to **"SID Snapshot Records"** on the left.
 - d. Select the **"Excel" radio button** and select **"Export Data"**.
 - g. Once you have the spreadsheet on your desktop you can filter to view the **Program Type Codes (PTC)** that are **Ungraded** (PTC 18 through 33).

The attached form can be e-mailed or mailed to us at one of the addresses below:

E-MAIL: contact@whitehallnj.com

65 Whitehall Associates, Inc.
Fayson Lakes Road
Kinnelon, NJ 07405-3129

DISTRICT ENROLLMENTS AS OF OCTOBER 15, 2018

DISTRICT: FRANKLIN LAKES

COUNTY: BERGEN

DATE: March 12, 2019

CONTACT : MICHAEL SOLOKAS

TITLE: BUSINESS ADMINISTRATOR / BOARD SECRETARY

GRADE LEVEL	NJSMART PROGRAM TYPE CODES	WHITE		BLACK		HISPANIC		ASIAN		NATIVE AMERICAN		HAWAIIAN NATIVE		2 OR MORE RACES		TOTAL
		MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	
Pre-Kindergarten - 3	3H, 3F															
Pre-Kindergarten - 4 & 5	4H, 4F, 5H, 5F															
Kindergarten	KH, KF															
Grade 1	01															
Grade 2	02															
Grade 3	03															
Grade 4	04															
Grade 5	05															
Grade 6	06															
Grade 7	07															
Grade 8	08															
UNGRADED	18 THRU 33															
TOTAL																

SCHOOL	GRADE LEVEL												
	PK-3	PK-4/5	K	1	2	3	4	5	6	7	8	UG	TOTAL
Franklin Avenue M.S. (015)													
Colonial Road School (040)													
High Mountain Road E.S. (020)													
Woodside Avenue E.S. (030)													
TOTAL													

DISTRICT WIDE FIGURES:

NUMBER ELIGIBLE FOR FREE LUNCH:

NUMBER ELIGIBLE FOR REDUCED LUNCH:

FEE STRUCTURE

Whitehall Associates, Inc. will prepare the Study outlined in the Scope of Work above, for a fixed fee of **TWO THOUSAND DOLLARS (\$2,000.00)** plus the costs of additional printing, binding and shipping.

GENERAL:

The fees stated above will be due as follows:

Upon submission of the final document: **TWO THOUSAND DOLLARS (\$2,000.00)** plus the cost of any additional time and printing.

The stated fees include a draft and five copies of the final report.

If additional copies of the final report are desired they will be furnished at Whitehall's additional cost of printing, binding and shipping plus a ten percent surcharge.

Drafts will be e-mailed as a .PDF file. The final report will be plastic comb bound without tabs. The cost of tabs, color, and/or coated papers will be charged back to the district at Whitehall's additional cost plus a ten percent surcharge.

The final submission will also contain a .PDF reproduction master of the report on a CD.

Any meeting time will be billed at the hourly rate of \$175.00. Time charged will include time preparing for meetings, time at meetings, and travel time.

In the event Whitehall Associates, Inc. tenders and the Board receives any portion of the work described in any paragraph of the Scope of Work, the Board will pay Whitehall Associates, Inc. a pro-rata portion of the fee due for the completion of all such work in that paragraph.

Completion time is dependent upon several factors, such as the scope of work, Board schedules, availability of data from various state and local agencies, and weather. Whitehall anticipates completion in the most expeditious manner consistent with solid, professional results.

Whitehall Associates, Inc. reserves the right to modify or withdraw this proposal if it is not executed by the issuance of a purchase order on or before May 1, 2019.

JOSEPH RICHARDSON

WHITEHALL ASSOCIATES, INC.

65 Fayson Lakes Road
Kinnelon, New Jersey 07405

Education: BS in Civil Engineering, The Citadel
BA, *magna cum laude*, Rutgers University
MS, New York Medical College
PhD, Rutgers University

Professional Experience: Dr. Richardson began his career in the Army Corps of Engineers with tours of duty in Germany and Vietnam. He then entered the private sector as an engineer for a major oil company. Upon completion of graduate studies, he became a full-time college professor and progressed to the administration as Director of Campus Planning. Dr. Richardson was the project manager for a major public school renovation project in Elizabeth, New Jersey before joining Whitehall Associates.

Dr. Richardson has had extensive experience in the design of civil works, construction, operation of physical plants, teaching and academic administration. He is a former school board member and former President of the Morris County Educational Services Commission. Dr. Richardson was in the first group of school board members to be designated a Certificated Board Member by the New Jersey School Boards Association. He is also an independent consultant for the New Jersey Department of Education.

Dr. Richardson's responsibilities as President of Whitehall Associates, Inc. include liaison with the New Jersey Department of Education, the preparation of demographic studies and the development of software applications for school demographics. He has been in charge of projects from single school districts to large urban districts such as Paterson, Elizabeth and Toms River.

Honors: Who's Who in America
Marquis Who's Who Lifetime Achievement Award
Sigma Xi
President's Plaque Award, New Jersey School Boards Association
Graduated, *magna cum laude*, Rutgers University

Affiliations: President, Whitehall Associates, Inc.
Military Officers of America, Life Member (Past President of the New Jersey Council and of the Northern New Jersey Chapter)
Society of American Military Engineers, Life Member, (State Treasurer 1988-89)
The Citadel Alumni Association, Life Member
Rutgers University Alumni Association

Request for Taxpayer Identification Number and Certification

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

Print or type
See Specific Instructions on page 2.

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

WHITEHALL ASSOCIATES, INC.

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

3 Check appropriate box for federal tax classification; check only **one** of the following seven boxes:

- ☐ Individual/sole proprietor or single-member LLC
☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶
Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner.
☐ Other (see instructions) ▶
- ☐ C Corporation ☒ S Corporation ☐ Partnership ☐ Trust/estate

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

Exempt payee code (if any) _____
Exemption from FATCA reporting code (if any) _____
(Applies to accounts maintained outside the U.S.)

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

65 FAYSON LAKES ROAD

6 City, state, and ZIP code

KINNELON, NEW JERSEY 07405-3129

Requester's name and address (optional)

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

Social security number

____ - ____ - _____

or

Employer identification number

2 2 - 2 7 7 4 3 7 8

Part II Certification

Under penalties of perjury, I certify that:

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

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Sign
Here

Signature of
U.S. person ▶

J. Richardson

Date ▶ **OCTOBER 1, 2015**

General Instructions

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

Future developments. Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at www.irs.gov/fw9.

Purpose of Form

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

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

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

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding?* on page 2.

By signing the filled-out form, you:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
- Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.

STATE OF NEW JERSEY
BUSINESS REGISTRATION CERTIFICATE
FOR STATE AGENCY AND CASINO SERVICE CONTRACTORS

DEPARTMENT OF TREASURY/
DIVISION OF REVENUE
PO BOX 252
TRENTON, N J 08646-0252

TAXPAYER NAME:

WHITEHALL ASSOCIATES, INC.

TAXPAYER IDENTIFICATION#

222-774-378/000

ADDRESS

65 FAYSON LAKES ROAD
KINNELON NJ 07405

EFFECTIVE DATE:

10/01/86

FORM-BRC(08-01)

TRADE NAME:

CONTRACTOR CERTIFICATION#

0074826

ISSUANCE DATE:

09/13/01

Patricia A. Chacchis

Director, Division of Revenue

This Certificate is NOT assignable or transferable. It must be conspicuously displayed at above address.

Certification 13134

CERTIFICATE OF EMPLOYEE INFORMATION REPORT
RENEWAL

This is to certify that the contractor listed below has submitted an Employee Information Report pursuant to N.J.A.C. 17:27-1.1 et. seq. and the State Treasurer has approved said report. This approval will remain in effect for the period of 15-DEC-2013 to 15-DEC-2020

WHITEHALL ASSOCIATES, INC.
65 FAYSON LAKES ROAD
KINNELON

NJ 07405 3129



Andrew P. Sidamon-Eristoff

Andrew P. Sidamon-Eristoff
State Treasurer



PHILADELPHIA
INSURANCE COMPANIES

A Member of the Tokio Marine Group

Policies & Bonds

Policy Summary

PolicyPHSD1372284

[Verification of Coverage Form](#)

Insured Name: Whitehall Associates, Inc. Account Number: 80757579

Insured Address: 65 Fayson Lake Rd

Product Description: Miscellaneous Professional Liability

Insured City: Kinnelon

Effective Date: 9/27/2018

Insured State: NJ

Expiration Date: 9/27/2019

Insured Zip: 07405-3129

Insured Phone: (973) 838-7823

Billing Plan: FIXED ANNUAL

Bill To: Bill Insured