

Whitehall Associates, Inc.

65 Fayson Lakes Road
Kinnelon, New Jersey 07405-3129

www.whitehallnj.com

Joseph Richardson, PhD

973-838-7823

E-MAIL: jrichardson@whitehallnj.com

June 10, 2015

E-MAILED TO: msolokas@franklinlakes.k12.nj.us
FEDEX TRACKING #: 7738 0505 7730

Mr. Michael Solokas
Business Administrator
Franklin Lakes Public Schools
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 Public Schools.

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

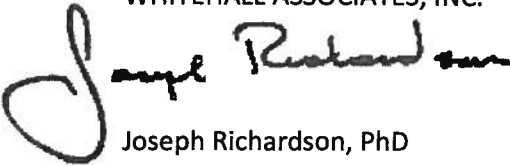
- Part 1: Firm Brochure and References
- Part 2: Scope of Work
- Part 3: Responsibility of the District
- Part 4: Fee Proposal
- Part 5: Project Team Information
- Part 6: IRS Form W-9
- Part 7: Business Registration Certificate
Certificate of Employee Information Report
- Part 8: Certificate of Insurance

Our presentation to the Franklin Lakes Public Schools 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

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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 250 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)

Anthony N. Dragona, RSBA
Business Administrator/Board Secretary
Union City Board of Education
3912 Bergeb Turnpike
Union City, NJ 07087-2507
(201) 348-5677

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

Dennis J. Nettleton
Business Administrator/Board Secretary
Ewing Township Public Schools
2099 Pennington Road
Ewing, NJ 08618-1107
(609) 538-9800

Patrick Caufield
Business Administrator/Board Secretary
Fairview Board of Education
130 Hamilton Avenue
Fairview, NJ 07022
(201) 943-0201

Patrick DeGeorge
Business Administrator/Board Secretary
Matawan-Aberdeen Board of Education
One Crest Way
Aberdeen, NJ 07747-2286
(732) 705-4017

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 Public Schools 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 15th from NJSMART enrollments reported by the district to NJDOE. 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 Franklin Lakes 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 and places.

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

FEE STRUCTURE

Whitehall Associates, Inc. will prepare the Study outlined in the Scope of Work above, for a fixed fee of **ONE THOUSAND FIVE HUNDRED DOLLARS (\$1,500.00)** plus the costs of meetings, additional printing, binding and shipping.

GENERAL:

The fees stated above will be due as follows:

Upon submission of the final document: **ONE THOUSAND FIVE HUNDRED DOLLARS (\$1,500.00)** 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 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 July 24, 2015.

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 and Elizabeth.

Honors: Who's Who in America
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 (President of the New Jersey Council of Chapters and Secretary and Past President of the Northern NJ Chapter)
Society of American Military Engineers, Life Member, (State Treasurer 1988-89)
The Citadel Alumni Association, Life Member (Vice President, Mid-Hudson Chapter)
Rutgers University Alumni Association

RAYMOND J. ALBANO

WHITEHALL ASSOCIATES, INC.

65 Fayson Lakes Road
Kinnelon, New Jersey 07405

Education: BS, Seton Hall University
MA, Seton Hall University
Post Graduate Studies, Seton Hall University, Columbia University

Professional Experience: Mr. Albano began his career as an elementary teacher. He then moved to elementary school principal positions in two districts. From there he acquired a superintendent position which he held for twenty years. Since his retirement in 1995, he has served as Interim Superintendent in more than a dozen school districts in New Jersey.

Mr. Albano successfully planned and implemented a school referendum project. His school district was the recipient of Blue Ribbon School Award. He was responsible for initiating a region wide program for autistic students.

Mr. Albano has been a presenter at New Jersey School Boards Association Annual Workshops and New Jersey Association of School Administrators Conferences.

Mr. Albano has served as a consultant for: Strategic Planning, Administrative Organizational Study, Superintendent and Principal Searches, All Day Kindergarten, and Demographic Studies. He continues to serve as Facilitator for Seton Hall University Institute for Educational Leadership, Research/Renewal for new Bergen County Superintendents. He is a New Jersey certified mentor for school administrators.

Honors: Past President of New Jersey Association of Elementary School Principals
Distinguished Service Award from New Jersey Association of School Administrators
Distinguished Service Award from Bergen County Association of School Administrators
Distinguished Educator Award from New Jersey Council of Education

Affiliations: New Jersey Association of School Administrators
New Jersey Council of Education
Cresskill/Demarest Rotary

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: <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> 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. <input type="checkbox"/> Other (see instructions) ▶ _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>
5 Address (number, street, and apt. or suite no.) 65 FAYSON LAKES ROAD	Requester's name and address (optional)
6 City, state, and ZIP code KINNELON, NEW JERSEY 07405-3129	
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.

Social security number									
				-			-		
or									
Employer identification number									
2	2	-	2	7	3	4	3	7	8

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.

Part II Certification

Under penalties of perjury, I certify that:

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

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

Sign Here Signature of U.S. person ▶

Date ▶ **FEBRUARY 2, 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:

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

TRADE NAME:

TAXPAYER IDENTIFICATION#
222-774-378/000

CONTRACTOR CERTIFICATION#
0074826

ADDRESS
65 FAYSON LAKES ROAD
KINNELON NJ 07405

ISSUANCE DATE:
09/13/01

EFFECTIVE DATE:
10/01/86

Patricia A. Chacchis
Director, Division of Revenue

FORM-BRC(08-01)

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



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Policy Summary

PolicyPHSD979240

Verification of Coverage Form

Insured Name: Whitehall Associates, Inc.
 Insured Address: 65 Fayson Lake Rd
 Insured City: Kinnelon
 Insured State: NJ
 Insured Zip: 07405-3129
 Billing Plan: FIXED ANNUAL

Account Number: 80757579
 Product: Miscellaneous
 Description: Professional Liability
 Effective Date: 9/27/2014
 Expiration Date: 9/27/2015
 Insured Phone: (973) 838-7823
 Bill To: Bill Insured

Policy Coverages

Coverage Description	Premium (\$)
Specialty Lines	2,420.00

Policy Documents

Document	Printing Instruction
Policy PHSD979240	

Policies with an effective date of 2007 or later are available to be downloaded online. If your policy begins with a "FW" please reference material sent to you via email.