

Whitehall Associates, Inc.

65 Fayson Lakes Road
Kinnelon, New Jersey 07405-3129

www.whitehallnj.com

973-838-7823

E-MAIL: whitehallnj@msn.com

Joseph Richardson, PhD

June 23, 2013

E-MAILED TO: jdamato@twpunionschools.org

FEDEX TRACKING #: 7962 9862 7117

James J. Damato, Esq.
Board Attorney/Board Secretary
Union Township Board of Education
2369 Morris Avenue
Union, NJ 07083-5703

Dear Mr. Damato:

In response to your request, Whitehall Associates is pleased to submit its quotation for the preparation of a Demographic Study for the Union Township Board of Education.

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

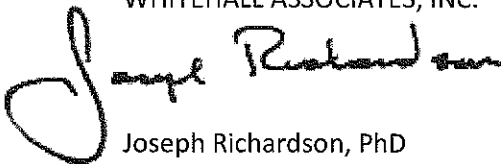
- Part 1: Firm Brochure and References
- Part 2: Scope of Work
- Part 3: Responsibility of the District
- Part 4: Fee Proposal
- Part 5: Project Team Information
- Part 6: Business Registration Certificate
- Part 7: Certificate of Employee Information Report
- Part 8: Certificate of Insurance

Our presentation to the Union Township Board of Education 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 education possible 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.

Whitehall offers a competent, professional, planning service that supports the district's pursuit of adequate facilities for their educational program. 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 www.whitehallnj.com for additional information.

REFERENCES: (Additional references available on request)

Louis J. Pepe, RSBA, Business Administrator
Summit Board of Education
14 Beekman Terrace
Summit, NJ 07901-1702
(908) 273-3025

Dr. John Ambroggi, Superintendent
Newport Board of Education
15 Wickham Road
Newport, RI 02840-4232
(401) 847-2100

Charles Shay, Project Administrator
Eatontown Public Schools
5 Grant Avenue
Eatontown, NJ 07724-1309
(732) 935-3301

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

Edward McManus, Business Administrator
Brielle Board of Education
605 Union Lane
Brielle, NJ 08730-1439
(732) 528-6400 ext 202

John Petrelli, Superintendent
North Haledon Board of Education
201 Squawbrook Road
North Haledon, NJ 07508-2760
(973) 427-4376

SCOPE OF WORK

It is understood that the Union Township Board of Education 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 the former Fall Survey Report, NJSMART, and from the enrollments reported by the district to us as indicated in the following section. Birth figures are obtained from the New Jersey Department of Health and Senior Services. 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 municipality 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 TWO THOUSAND FIVE HUNDRED DOLLARS (\$2,500.00) plus the costs of additional meetings, printing, binding and shipping.

GENERAL:

The fees stated above will be due as follows:

Upon issuance of a Purchase Order: ONE THOUSAND DOLLARS (\$1,000.00)

Upon submission of the draft document: ONE THOUSAND DOLLARS (\$1,000.00)

Upon submission of the final document: FIVE HUNDRED DOLLARS (\$500.00) plus the cost of any additional time and printing.

The stated fees include one meeting, 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.

Additional 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 August 5, 2013.

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 (Secretary and Past President, Northern NJ Chapter and Vice President, NJ Council)
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

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

TRADE NAME:

CONTRACTOR CERTIFICATION#

0074826

ISSUANCE DATE:

09/13/01

Patricia A. Chacochis

Director, Division of Revenue

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

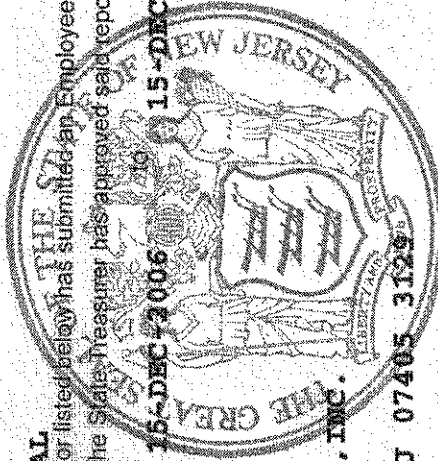
FORM-BRC(08-01)

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-2006 to **15-DEC-2013**



Bradley Abelen

State Treasurer

**WHITEHALL ASSOCIATES, INC.
65 FAYSON LAKES RD.
KINNELON NJ 07405 3129**



PHILADELPHIA INSURANCE COMPANIES

A Member of the Tokio Marine Group

One Bala Plaza, Suite 100
Bala Cynwyd, Pennsylvania 19004
610.617.7900 Fax 610.617.7940
PHLY.com

Policy Summary

Policy PHSD766749

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:	9/27/2012
Insured State:	NJ	Expiration Date:	9/27/2013
Insured Zip:	07405-3129	Insured Phone:	(973) 838-7823
Billing Plan:	FIXED ANNUAL	Bill To:	Bill Insured

Policy Documents

Document

Printing Instruction

Policy PHSD766749