

OPRA request - Real Property Data Contracts

Anonymous <opra+request-8218-90c663cd@requests.opramachine.com>

Mon 11/25/2019 2:18 PM

To: Clerk <clerk@englishtownnj.com>

Dear Englishtown Borough,

This is a request for public records made under OPRA and the common law right of access. I am not required to fill out an official form. Please acknowledge receipt of this message.

Records requested:

- ✓ 1) Resolution, circa 2014, permitting Englishtown to participate in the Assessment Demonstration Program
- ✓ 2) Resolution, circa 2014, regarding selected as part of Assessment Demonstration Program
- ✓ 3) Contract with Realty Data Systems of Shrewsbury, or its predecessor for the contract years 2014-2019 for services as part of Assessment Demonstration Program
- ✓ 4) Contract with Realty Data Systems of Shrewsbury for years 2019 and onward for services as part of Assessment Demonstration Program

Yours faithfully,

An Englishtown Taxpayer

Please use deliver records electronically via email to the below UNIQUE address for all replies to this request:

opra+request-8218-90c663cd@requests.opramachine.com

Is clerk@englishtownnj.com the wrong address for OPRA requests to Englishtown Borough? If so, please contact us using this form:

https://opramachine.com/change_request/new?body=englishtown_borough

Disclaimer: This message and any reply that you make will be published on the internet. Our privacy and copyright policies:

<https://opramachine.com/help/officers>

View this OPRA request & responses online:

https://opramachine.com/request/real_property_data_contracts

**BOROUGH OF ENGLISHTOWN
RESOLUTION NO. 2019-117**

**RESOLUTION AWARDING A CONTRACT FOR REAL PROPERTY DATA
COLLECTION AND VERIFICATION SERVICES AND AUTHORIZING THE
EXECUTION OF A CONTRACT**

WHEREAS, the Borough of Englishtown is participating in the Assessment Demonstration Program, P.L. 2013, c.15, signed into law by Governor Christie in March 2013 to begin in tax year 2014; and

WHEREAS, the Borough advertised, and received proposals on July 17, 2019 at 10:00 AM, in the Borough's offices, for the Project; and

NOW THEREFORE BE IT RESOLVED, that the Borough Council awards a contract to Realty Data Systems of Shrewsbury, N.J, in the amount of \$21,870.00, the total bid, for the Real Property Collection and Verification Services project.

NOW THEREFORE BE IT FURTHER RESOLVED, that the Mayor is authorized to execute a contract with Realty Data Systems of Shrewsbury, N.J., in the amount of \$21,870.00 and the Chief Financial Officer will provide certification of funds each budget year.

BE IT FURTHER RESOLVED, that the contract was conditioned upon the Borough Attorney's review and approval of the contract document, and certification by the Borough's Chief Financial Officer of the availability of funds for this project, which has all been found satisfactory.

BE IT FURTHER RESOLVED, that the Clerk's Office is authorized to forward a copy of this Resolution to the Borough Attorney, the Borough Engineer, Realty Data Systems and the Borough's Chief Financial Officer.

Offered By: C/Robilotti

Seconded By: C/Marter

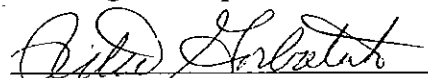
Roll Call: Ayes: C/Krawiec, C/Mann, C/Marter, C/Robilotti, C/Wojyn

Nays: None

Abstain: None

Absent: None

I do hereby certify the above to be a true copy of a resolution adopted by the Governing Body of the Borough of Englishtown at a regular meeting held September 25, 2019.


Peter Gorbatuk, Municipal Clerk

Realty Data Systems LLC
2 Majestic Avenue – Suite 2
Lincroft, NJ 07738
Tel: 732.276.1057
Fax: 732.276.1056
www.rdsnj.com



Serving New Jersey Municipalities

July 8, 2019

Borough of Englishtown
15 Main Street
Englishtown, NJ 07726

Please find our bid package attached for the Request for Proposals for the Real Property Data Collection and Verification Services project.

We appreciate the Borough's consideration of our proposal and welcome the opportunity to provide any additional information required.

Our firm is well-qualified to perform the services being sought by the Borough, as the leading provider of inspection and data collection services in Monmouth County. We have also served as the inspection vendor for the Borough since 2014 and have received very positive feedback from residents and municipal officials.

We have an unmatched familiarity with the Borough's properties, maps and record cards, and are the most experienced ADP vendor.

Please see the Qualifications section contained in our package, which outlines our work on behalf of more than 40 Monmouth County municipalities.

Additionally, our firm seeks to maximize interior inspection rates by allowing sufficient time for property owners to make appointments following our first visit. RDS' competitors often return to the same properties more quickly (at times within 24 hours), which can result in lower interior rates and resident dissatisfaction.

There are several items we wish to bring to the Borough's attention with respect to the RFP and our bid, as follows:

- (1) Please note that one small change is required in the main heading of the Contract since a 5-year inspection project does not require an extension provision.
- (2) Please note that there is one minor discrepancy since the Contract Appendices require the standard 2-week advance mailing to property owners (which is the legal requirement utilized in prior years by the Borough), but a provision of the Contract specifies a different time period.
- (3) While we do not feel it is our responsibility to comment on other vendors, there is one important item we must bring to the Borough's attention.

Section 3 of the Contract ("Conflict of Interest") is a legal requirement that vendors and their affiliates are prohibited from being engaged if any of their officers, stockholders, employees or other parties serve as Tax Assessors in Monmouth County, or represent property owners in tax appeals in New Jersey.

While there are many qualified vendors, one (1) company is prohibited from serving the Borough: Appraisal Systems, Inc. ("ASI").

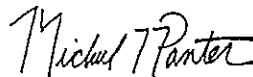
ASI has an executive and full-time employee who serves as the Tax Assessor in Wall Township. In addition, ASI represents property owners in tax appeals using a different company name (although that company has the same owner, address and executives as ASI so it is, at minimum, an affiliate).

This conflict has the subject of litigation with at least one municipality in Monmouth.

Thank you again for your consideration, and we look forward to working with the Borough if our firm is re-engaged.

I can be reached at any time if further information is required.

Sincerely,

A handwritten signature in cursive script that reads "Michael J. Panter".

Michael J. Panter, Esq.
Managing Member
Realty Data Systems LLC

Encl

REQUEST FOR PROPOSALS
FOR
BOROUGH OF ENGLISHTOWN, NEW JERSEY

REAL PROPERTY DATA COLLECTION AND
VERIFICATION SERVICES IN ACCORDANCE
WITH THE ASSESSMENT DEMONSTRATION
PROGRAM

(P.L. 2013, c. 15)

January 1, 2019 through December 31, 2023

REQUEST FOR PROPOSAL

NOTICE IS HEREBY GIVEN that sealed Proposals will be received by the Municipal Clerk of the Borough of Englishtown (the "Municipality"), State of New Jersey, on (07/17/2019) at 10:00 a.m. in the Clerk's Office of the Borough of Englishtown, located at 15 Main Street, Englishtown, NJ 07726.

The annual performance of real property data collection and verification services to cover 20% of all properties annually with all parcels located within the Municipality completed over the five (5) year period between January 1st, 2019 and December 31st, 2023 (also referenced as the "project") awarded as a three (3) year contract with the option of two (2) additional one (1) year awards.

All requirements associated with the project are set forth in a Request for Proposals package. Such packages may be obtained from the Municipality's Clerk's Office, 15 Main Street, Englishtown, NJ 07726, telephone number (732) 446-9235, during regular business hours, 9:00 A.M. to 4:00 P.M., Monday through Friday, excluding holidays or on the Borough website (). Any questions regarding the Request for Proposals should be directed to the Municipality's Clerk () at the telephone number and/or address specified above.

This project shall be awarded through a "fair and open" process pursuant to N.J.S.A.19:44A-20.4, *et seq.*, to the Contractor whose Proposal is most advantageous to the Municipality, price and other factors considered, in accordance with the review criteria set forth in the Request for Proposals.

All Vendors who submit a Proposal must be able to demonstrate that they are capable of completing the project so that it may be implemented for the 2019 tax year, under the applicable time tables set forth in the Assessment Demonstration Program (P.L. 2013 Ch. 15) or such other applicable laws.

The Municipality reserves the right to reject any or all submissions due to any defects or waive informalities and accept any submissions that in its judgment will be in the best interest of the Municipality. The Municipality shall award the Contract or reject all submissions no later than sixty (60) days from receipt of same.

By authorization of the Borough of Englishtown.

ATTENTION ALL VENDORS:

All Vendors must complete, execute and submit the "Documents Checklist" set forth below and include completed and executed versions of all of the enumerated forms/items set forth below in order for their Proposal to be considered complete. All forms/items must be typewritten or written in ink. ALL SUBMISSIONS MUST INCLUDE ONE (1) ORIGINAL COPY AND ONE (1) COPY.

DOCUMENTS CHECKLIST

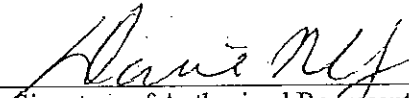
(Check the box for each document that is enclosed)

Initial each item

(Vendor's
initials)

- | | |
|---|-----------|
| 1. Proposal Form to the Municipality | <i>BN</i> |
| 2. Non-Collusion Affidavit | <i>BN</i> |
| 3. Stockholder Statement of Ownership | <i>BN</i> |
| 4. Affirmative Action Questionnaire | <i>BN</i> |
| 5. Statement of Qualifications | <i>BN</i> |
| 6. Exceptions | <i>BN</i> |
| 7. No Response Proposal Survey | <i>BN</i> |
| 8. Contract | <i>BN</i> |
| 9. Appendix A (to proposed Contract) – Property Class Summary | <i>BN</i> |
| 10. Appendix B (to proposed Contract) - List of Supervisors | <i>BN</i> |
| 11. Appendix C (to proposed Contract) – Employee Background Release | <i>BN</i> |
| 12. Appendix D (to proposed Contract) – Schedule of Completion | <i>BN</i> |
| 13. Appendix E (to proposed Contract) – Cost Proposal for 5-Year Internal Inspection Plan | <i>BN</i> |
| 14. Appendix F (to proposed Contract) – Cost Proposal for Added/Omitted Assessment Inspections | <i>BN</i> |
| 15. Appendix G (to proposed Contract) – Cost Proposal for Farmland Assessment Inspections (if applicable) | <i>BN</i> |
| <hr/> | |
| 16. Listing of Subcontractors | <i>BN</i> |
| 17. List of all key employees at date of Proposal indicating educational background | <i>BN</i> |

Name of Corporation, Partnership Entity or
Individual: Realty Data Systems LLC



Signature of Authorized Representative

Print Name and Title of Authorized
Representative of Entity Signing This Document
Daniel Kelly - Member

July 8, 2019
Date

PROPOSAL FORM

BOROUGH OF ENGLISHTOWN, NEW JERSEY

REAL PROPERTY DATA COLLECTION AND VERIFICATION SERVICES

2019 through 2023

WITH RESPECT TO THE COLLECTION AND VERIFICATION OF ALL REAL
PROPERTY DATA SITUATED WITHIN THE BOUNDARIES OF THE BOROUGH OF
ENGLISHTOWN, NEW JERSEY:

Realty Data Systems LLC

COMPANY NAME

DOES HEREBY PROPOSE TO UNDERTAKE SAID DATA COLLECTION PROJECT IN
ACCORDANCE WITH THE WITHIN SPECIFICATIONS AND PROVISIONS AT A TOTAL
COST OF:

\$21,870

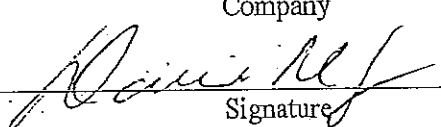
DOLLARS

Twenty One Thousand Eight Hundred Seventy Dollars

(AMOUNT IN WORDS)

Realty Data Systems LLC

Company


Signature

Daniel Kelly

Print Name

Member

Title

July 8, 2019

Date

Pricing based on the current parcel count. "Per parcel" pricing herein is fixed. Excludes
amounts for Added/Omitted, Farmland Assessment, additional A/B/C cards or appeal
inspections.

NON-COLLUSION AFFIDAVIT

State of New Jersey

County of Monmouth

ss:

I, Daniel Kelly, residing in Shrewsbury Borough in the County of Monmouth and State of New Jersey, being of full age and duly sworn according to law on my oath depose and say that:

I am a Member of the firm of Realty Data Systems LLC, the Vendor making the Proposal for the above named project, and that I executed the said Proposal with full authority so to do; that said Vendor has not, directly or indirectly, entered into an agreement, participated in any collusion, or otherwise taken any action in restraint of free, competitive Proposal submission in connection with the above named project; and that all statements contained in said Proposal and in this affidavit are true and correct, and made with full knowledge that the Municipality relies upon the truth of the statements contained in said Proposal and in the statements contained in this affidavit in awarding the Contract for said project.

Subscribed and sworn to before me

this 8th day of July, 2019

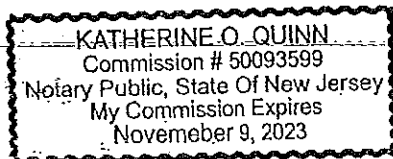
Katherine O. Quinn

Notary Public, State of New Jersey

Daniel Kelly

Daniel Kelly

My Commission expires 11/9/23
(seal)



**STATEMENT OF INDIVIDUAL(S) OWNING 10% OR MORE OF STOCK OR
INTEREST IN THE VENDOR'S BUSINESS ENTITY**

In accordance with N.J.S.A. 52:25-24.2, no corporation, partnership, limited partnership, limited liability corporation, limited liability partnership, Subchapter S Corporation or sole proprietorship (any, an "Entity"), shall be awarded a Contract unless prior to the receipt of the Proposal or accompanying the Proposal of the Entity, there is submitted to the BOROUGH OF ENGLISHTOWN, a statement setting forth the names and addresses of all stockholders who own 10% or more of stock, of any class or of all individual partners who own a 10% or greater interest in the Entity. If one or more such stockholder or partner is itself a corporation or partnership, the stockholders holding 10% or more of that corporation's stock, or the individual partners owning 10% or greater interest in that partnership, as the case may be, shall also be listed. The disclosure shall be continued until names and addresses of every non-corporate stockholder and individual partner, exceeding the 10% ownership criteria established in this act has been listed. This form shall be submitted with the Proposal whether or not a stockholder or partner owns less than 10% of the business submitting the Proposal.

Date: July 8, 2019 LEGAL NAME OF VENDOR: REALTY DATA SYSTEMS LLC

Type of Corporations:

Limited Liability Corporation
Subchapter S Corporation

☐
☐

Complete if the Vendor is one of the 3 Types of Corporations:

Date Incorporated: 2/5/2013
Note: Realty Appraisal
(affiliate) incorporated
in NJ in 1934
Where Incorporated: New Jersey

Type of Partnerships:

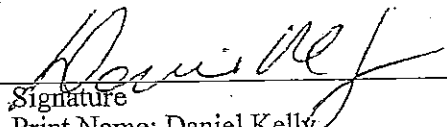
Limited Partnership
Limited Liability Company

☐
☒

Sole Proprietorship

☐

NOTE: If no Stockholder or partner owns 10% or more of the business submitting the Proposal, please sign and date this form.


Signature

Print Name: Daniel Kelly

July 8, 2019

Date

2 Majestic Ave - Suite 2
Street Address

Lincroft NJ 07738
Municipality State Zip

(732) 276 - 1057
Telephone No.

(732) 276-1056
Fax

Listed below are the names and addresses of all stockholders or individuals who own ten (10) percent or more of its stock of any classes, or who own ten (10) percent or greater interest herein.

Michael Panter

457 Sycamore Ave, Shrewsbury, NJ 07702

Steven Rubenstein

4912 Bergenline Ave, West New York, NJ 07093

Neil Rubenstein

47 Runnymede Rd, Berkeley Heights, NJ 07922

Daniel Kelly

457 Sycamore Ave, Shrewsbury, NJ 07702

BOROUGH OF ENGLISHTOWN
NOTICE TO VENDORS
AFFIRMATIVE ACTION REQUIREMENTS
N.J.S.A. 10:5-31 and N.J.A.C. 17:27
PROCUREMENT AND SERVICE CONTRACTS

"Vendors are required to comply with the requirements of P.L. 1975, c. 127" (N.J.A.C. 17:27)

A. ALL VENDORS

1. Within seven (7) days after receipt of notification of intent to award the Contractor receipt of the Contract, whichever is sooner, the successful Vendor must submit one of the following forms of evidence:
 - a) A Federal Letter of Affirmative Action Plan Approval from the U.S. Department of Labor's Office of Federal Contract Compliance Programs (OFCCP). This letter cannot be more than one year old from the date of issuance.

OR

- b) A State of New Jersey Certificate of Employee Information Report.

OR

- c) A completed Affirmative Action Employee Information Report (Form AA302).

Please note that the Affirmative Action Affidavit for Vendors having less than fifty (50) employees is no longer acceptable.

2. The successful Vendor(s) may obtain the Affirmative Action Employee Information Report (AA302) from the Purchasing Division during normal business hours.
3. The successful Vendor(s) must submit the white and canary copies of the (AA302) Report to the State Affirmative Action Office. The pink copy is submitted to the public agency, and the gold copy is retained by the Vendor.

B. THE FOLLOWING QUESTIONS MUST BE ANSWERED BY ALL PROSPECTIVE VENDORS:

1. Do you have a Federal Letter of Affirmative Action Plan Approval? This letter cannot be more than one year old from the date of issuance.

Yes _____ No ✓ _____

a) If yes, please submit a photo copy of such approval. If no, _____

NOTICE TO VENDORS
AFFIRMATIVE ACTION REQUIREMENTS
N.J.S.A. 10:5-31 and N.J.A.C. 17:27
PROCUREMENT AND SERVICE CONTRACTS
(Continued)

2. Do you have a State of New Jersey Certificate of Employee Information Report (Certificate of Approval)?

Yes ✓ No _____

(attached)

a) If yes, please submit a photo copy of such approval.

If no,

3. Vendors must complete an Affirmative Action Employee Information Report (AA302) obtained from the Purchasing Division during normal business hours.

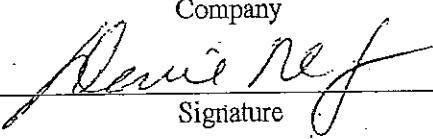
AFFIRMATIVE ACTION REQUIREMENTS P.L. 1975, c 127 (N.J.A.C. 17:27)

The undersigned Vendor certifies that he/she is aware of the commitment to comply with the requirements of P.L. 1975, c. 127 (N.J.A.C. 17:27) and agrees to furnish the required forms of evidence.

The undersigned Vendor further understands that his/her Proposal must be rejected as non-responsive if said Contractor fails to comply with the requirements of P.L. 1975, c. 127 (N.J.A.C. 17:27).

REALTY DATA SYSTEMS LLC

Company


Signature

Daniel Kelly

Print Name

Member

Title

July 8, 2019

Date

CERTIFICATE OF EMPLOYEE INFORMATION REPORT

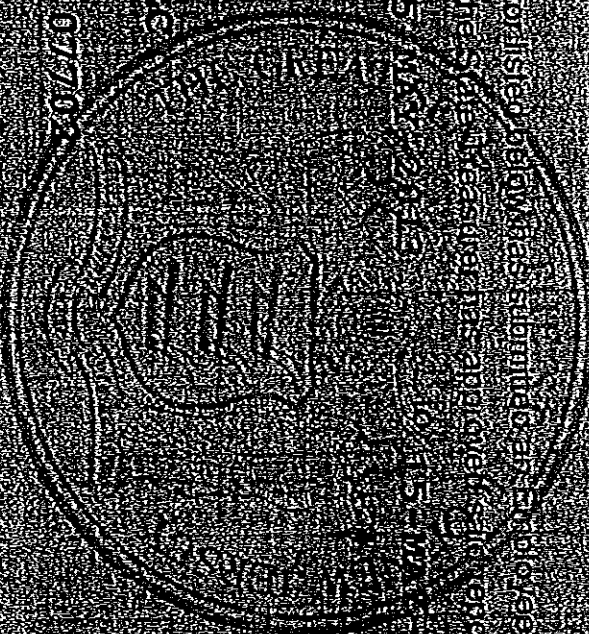
Certification 50797

INTERNAL

This is to certify that the information listed below has been obtained from the employee information report of the person listed below. The information listed below is for the period of 15 MAY 2012 to 15 MAY 2012.

HEAVY DATA SYSTEMS INC
55 WHITE ROAD SUITE C
CHERMSBURY

NG 07702



Andrew S. Shannon
State Treasurer

BOROUGH OF ENGLISHTOWN

QUALIFICATIONS

The Vendor is required to state in detail, in the space provided below, the following:

- (1) All work that the Vendor has performed that is similar in nature and scope to the proposed work and the dates of completion of same;
- (2) References and such other detailed information that will enable the Township to judge the Vendor's responsibility, experience, skill and financial standing;
- (3) Evidence that the Vendor maintains a permanent place of business;
- (4) A listing of equipment available to the Vendor for the work under the proposed Contract;
- (5) Evidence that the Vendor has suitable financial status to meet obligations incidental to the work; and
- (6) Evidence that the Vendor has appropriate technical experience to complete the work.

Please see attached.

Realty Data Systems LLC

Company

Signature

Daniel Kelly

Print Name

Member

Title

July 8, 2019

Date

(ATTACH ADDITIONAL PAGES, IF NECESSARY)

Qualifications

Background

Founded in 1934, Realty Appraisal Company ("Realty Appraisal") is recognized as the leading municipal revaluation and appraisal firm in the State of New Jersey and operates exclusively in the Garden State.

Rated as the best in the state for quality, accuracy and methodology by New Jersey's municipal tax assessors, the firm has achieved an unrivaled reputation for excellence due to its successful completion of more than 400 revaluation programs in 18 of New Jersey's 21 counties.

Headquartered in West New York, NJ (Hudson County), Realty Appraisal has offices throughout New Jersey, each of which is staffed with full time, highly trained professionals with many years of experience in data collection, property appraisal and revaluation.

Realty Data Systems

In February 2013, Michael Panter and the owners of Realty Appraisal founded Realty Data Systems LLC ("RDS") headquartered in Lincroft, NJ (Monmouth County), to perform annual property data collection and verification services on behalf of municipalities.

RDS' highly trained professionals utilize the latest technology to streamline the real estate inspection and data collection process on behalf of our municipal clients. Our firm has financial, equipment and staffing resources sufficient to undertake any municipal data collection project.

RDS has conducted annual inspection programs for more than 40 municipalities and has completed over 180,000 inspections across all property classes.

These projects have included five (5) years of annual projects completed successfully on behalf of the Borough.

Technology

Each RDS property inspector is equipped with a PC-based electronic tablet which is pre-populated with all existing municipal real estate records in a proprietary platform, which allows for real time updating and/or verification of all property information necessary for municipal assessment purposes.

These functions include but are not limited to digital floor plan sketching of primary and secondary structures, including all amenities; digital photography (including date and file names, consistent with any required county indexing); comprehensive exterior and interior property features; electronic inspector and property owner signatures; time and date stamps for all inspection visits; and GPS guidance.

Our electronic tablets update the firm's servers (and backups) in real time, which allow us to continually track the progress of all projects and to share regular updates with the municipality's Tax Assessor or other officials, and to update the municipality's property records within the County's CAMA database, with which our technology is fully compatible.

RDS' platform also eliminates the potential errors associated with traditional methods of data collection, which rely on paper inspection forms and sketches, separate photographs and the data entry of all information into a single property file. Our platform does not allow a property inspection to be concluded or data to be submitted until all data fields have been completed and verified.

Our technology, combined with the expertise of our partners and field professionals, enable us to provide the most accurate and time/cost-effective data collection services available in the industry.

Our Services

RDS provides a comprehensive package of data collection and verification services.

Our services include multiple visits to each property within a municipality's borders during each project period. This data allows the Tax Assessor to update property assessments on an annual basis in response to changes in the real estate market, and to capture additional tax revenue when property records are updated to reflect improvements and other changes.

These services include:

- Comprehensive real property inspection services
- Cost-effective pricing for all taxable and tax-exempt property classes
- Real-time electronic updating of municipal property records
- Exterior and interior inspections
- Digital photos, floor plan sketches, signatures and time/date stamps
- "Added and Omitted" and appeal inspections at the Tax Assessor's direction
- Advance notification to property owners
- Highly-trained inspectors with local office support services
- Farmland Assessment inspections

Our Professionals

Please note that bios for our Office and Field Staff can be found on our website at www.rdsnj.com. All field staff have extensive experience completing real property data collection and verification services in multiple municipalities across all property classes.

Consistent with our firm's mission to employ veterans, a majority of our positions since the firm's founding have been filled by military and law enforcement veterans, or by personnel who have worked on behalf of veteran organizations.

Michael Panter, Esq.

Michael Panter has been an attorney, investment banker and corporate executive in New Jersey and New York since 1995. Prior to forming RDS in 2013, he handled tax assessment cases relating to more than 400 properties and is the co-founder of an investment advisory firm overseeing pension and foundation assets on behalf of private hospital systems.

He was a member of the New Jersey State Assembly from 2004-2008, representing the 12th Legislative District in Monmouth and Mercer Counties. His efforts have been featured in national publications ranging from the *New York Times* to *Stars and Stripes*, and he has appeared on programs such as NPR's *All Things Considered* and Fox News Channel's *Hannity & Colmes*.

Michael earned his Bachelor of Arts *magna cum laude* from Syracuse University where he was elected to Phi Beta Kappa, and his Juris Doctorate from Harvard Law School.

He is involved in a variety of community and charitable activities.

Neil Rubenstein - SCRREA, C.T.A.

Neil Rubenstein has been a practicing appraiser of real estate for more than 30 years. He has spent a significant portion of his career engaged in data collection and the mass appraisal field, specifically as it relates to municipal revaluations. He has supervised projects for all types of municipalities, including urban centers, suburban communities, and rural districts.

Neil is a Certified Appraiser and Certified Tax Assessor and serves as Tax Assessor in the Township of Haworth, NJ.

He received his Bachelor of Arts from Muhlenberg College and has continued his education in a variety of tax assessment and real estate appraisal programs through Rutgers University, the NJ Division of Taxation and the Appraisal Institute of Real Estate Appraisers.

Both Neil and Steven Rubenstein have also completed multiple revaluations/reassessments in the Borough and are very familiar with its properties.

Steven Rubenstein - MAI, SCGRE, C.T.A.

Steven Rubenstein has been appraising property and performing data collection services since 1986. He has given testimony before the county tax boards of Monmouth, Middlesex, Morris, Bergen, Passaic, Hudson, Sussex, and Ocean Counties, as well as before the Tax Court of New Jersey.

Steven is a Certified Tax Assessor and Certified General Appraiser and is a member of the Appraisal Institute and Bergen County Association of Assessors. He has served as a guest speaker and panelist at numerous conferences and boards, and as the Tax Assessor for the Township of Glen Rock, NJ and Wood-Ridge Township, NJ.

Steven graduated from Boston University and has continued his education through a variety of seminars and courses given by the Appraisal Institute of Real Estate Appraisers.

Daniel Kelly, C.T.A.

Dan Kelly has been involved in the financial industry in a wide range of capacities for more than 30 years and served as a Commissioner on the Monmouth County Board of Taxation from 2005 through 2013, including a term as the Board President.

Dan is a Certified Tax Assessor, the co-founder of an investment firm specializing in hospital pension plan and foundation management, and previously served as the Chief Operating Officer and head of fixed income for a national advisory firm.

He is an active volunteer with many youth sports programs and charitable organizations, in addition to his local school system and church, and serves as the President of his local fire company.

Brandon Sherwood

Brandon Sherwood serves as a Field Supervisor and technology professional for RDS and has been engaged in the fields of construction and property management in New Jersey since 2002. He has served as a field supervisor and inspector for Realty Appraisal and RDS for more than eight (8) years.

Brandon has overseen revaluation, reassessment and annual property inspection projects in a variety of municipalities in both Monmouth and Middlesex Counties, and is a current Certified Tax Assessor candidate.

RDS CURRENT ANNUAL INSPECTION PROJECTS

The following is a list of RDS' annual data collection projects, with completion dates for each current inspection cycle (this list excludes Realty Appraisal's projects):

Aberdeen Township	2018
Allenhurst Borough	2019
Asbury Park City	2018
Atlantic Highlands	2023
Bradley Beach Borough	2019
Brielle Borough	2019
Colts Neck Township	2018
Eatontown Borough	2020
Englishtown Borough	2018
Fair Haven Borough	2018
Farmingdale Borough	2019
Freehold Borough	2021
Freehold Township	2022
Hazlet Township	2018
Highlands Borough	2021
Holmdel Township	2018
Howell Township	2023
Interlaken Borough	2023
Keyport Borough	2019

Little Silver Borough	2023
Loch Arbour Village	2018
Manalapan Township	2023
Matawan Borough	2018
Monmouth Beach	2019
Neptune Township	2019
Neptune City	2019
Red Bank Borough	2020
Roosevelt Borough	2023
Rumson Borough	2023
Sea Bright Borough	2020
Sea Girt Borough	2019
Shrewsbury Borough	2023
Shrewsbury Township	2018
Spring Lake Heights	2021
Tinton Falls Borough	2023
Union Beach Borough	2019
Upper Freehold Township	2019
West Long Branch Borough	2023

The Borough can contact the Tax Assessors in any of the above municipalities for references pertaining to RDS' work.

In addition, the Borough's Tax Assessor has worked extensively with RDS.

On a combined basis, RDS and Realty Appraisal have completed inspection/data collection, reassessment and revaluation projects on behalf of 50 of Monmouth County's 53 municipalities.

Borough of Englishtown

EXCEPTIONS

In the space below list any/all exceptions to these specifications that you will not be providing.

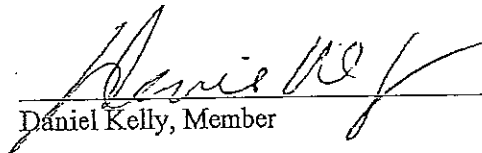
The Municipality reserves the right to accept or reject Proposals and to award the Contract based upon the best interests of the Township. If there are NO EXCEPTIONS, state "NONE."

1. NONE

2.

REALTY DATA SYSTEMS LLC

SUBMITTED BY:


Daniel Kelly, Member

July 8, 2019

DATED:

BOROUGH OF ENGLISHTOWN
NO RESPONSE PROPOSAL SURVEY

COMPLETE DATA COLLECTION AND VERIFICATION OF ALL REAL PROPERTIES

If you choose to respond to this Proposal, please write "N/A" on the following line: N/A

If you do not choose to respond to this Proposal, please complete the form below:

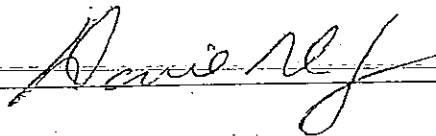
Name of Vendor: _____

Reason you did not respond (Check all that apply)

- ☐ Cannot supply product or service
- ☐ Cannot meet technical specifications
- ☐ Cannot meet delivery specifications
- ☐ Cannot meet legal requirements (i.e. performance/security/insurance, etc.)
- ☐ Cannot provide a competitive price at this time
- ☐ Interest in receiving specifications for informational purposes only
- ☐ Insufficient lead time to respond
- ☐ Other: (Please be specific)

Additional comments:

Signed: (optional)



BOROUGH OF ENGLISHTOWN
PROPERTY DATA COLLECTION AND VERIFICATION PROGRAM

CONTRACT FOR REAL PROPERTY DATA COLLECTION AND VERIFICATION SERVICES
FROM JANUARY 1st, 2019 through DECEMBER 31st, 2023, with the option of one (1) two-year
extension upon the mutual agreement of the Parties (the "Contract")

THE BOROUGH OF ENGLISHTOWN
a Municipal Corporation of the State of New Jersey
15 Main Street
Englishtown, NJ 07726
(hereinafter the "Municipality");

AND

REALTY DATA SYSTEMS LLC
2 Majestic Avenue – Suite 2
Lincroft, NJ 07738
(hereinafter the "Company", and together with the Municipality, the "Parties")

1. Program Definitions:

The Company agrees to prepare and execute a complete program for the collection and verification of all data of real properties situated within the confines of the Municipality (as illustrated on the Property Classification Summary attached hereto as Appendix A) commencing in 2019, or as directed by the Municipality upon the terms contained herein. Said work shall be performed in accordance with the terms and conditions contained herein, including the attached Appendices.

The Company must comply with the attached delivery schedule (Appendix D).

2. Contract Contingencies:

The Parties shall not have the authority to vary, alter, amend, or change this Contract once executed, without the written consent of the other party. No changes to the pricing or number of required inspection visits provided herein may be made following the submission of bids by prospective vendors.

The Company shall not have the right to subcontract any portion or function of this Contract, without receiving prior written approval from the Municipality's Tax Assessor (the "Assessor").

The Company shall be responsible for any and all work performed by any subcontractors allowed for in this Contract, if any.

3. Conflict of Interest:

No commissioner or employee of the Monmouth County Board of Taxation, no employee of the County of Monmouth, no assessor of a taxing district within Monmouth County and no official or employee of the Municipality shall have an interest whatsoever directly or indirectly, as an officer, stockholder, employee or any other capacity in the Company or its affiliates.

Neither the Company nor any of its or its affiliates' members, employees, officers, or stockholders shall represent any property owner or taxpayer filing a tax appeal in the State of New Jersey during

the term of the Contract.

Any violation by the Company of the provisions of this section shall result in the termination of this Contract and the Municipality shall commence a bid process for the remainder of the current project term and any extensions thereof.

4. Company Personnel:

Principals of the Company must include individuals that have at least five (5) years of practical and extensive experience in the collection of data for the purposes of mass appraisal.

Field personnel shall have a minimum of seventy (70) hours of in-service training pertaining to their particular phase of the work and shall be generally aware of other phases of the data collection project prior to starting field work. A sufficient number of field personnel shall be provided so as to meet the project completion schedule and other parts of this Contract.

The Company shall designate a qualified and responsible employee to supervise the operation of the Company's staff for the entire project, as designated in Appendix B. There shall be one (1) supervisor for no more than six (6) field data collectors or part thereof. The supervisor shall have at least five (5) years of experience in property inspection and/or appraisal work. These designated individuals shall make themselves available to the Assessor for consultation throughout the project.

Any members of the Company working in the field shall carry wearable identification cards in a form approved by the Borough's Assessor. All personnel conducting inspections or otherwise gathering data in the field must wear the approved identification card and present themselves in a neat and clean manner while conducting their duties in a professional and courteous manner.

The Company shall supply the Assessor and Municipality's Police Department with driver's license numbers, vehicle license plate numbers, and make of the vehicle or vehicles that will be used by field personnel on this project.

The Company shall require all personnel performing work on this project to authorize a background investigation of its employees by submitting the release attached hereto as Appendix C, or by providing the Police Department with a completed background check. This investigation shall include a National Criminal Information Center report (NCIC) and a driver's license review, which shall be at the expense of the Company.

Upon written notice to the Company, the Assessor may request removal of any person for this project whose work is unsatisfactory or has conducted him or herself in an unprofessional manner, or upon the advice and counsel of the Police Department.

5. Office Space:

The Company is responsible for the provision of its own office space, equipment and furnishings necessary to perform under the contract. The Company shall also provide adequate phone and email access during the pendency of the program to address inquiries and scheduling issues with taxpayers or their representatives.

6. Submission of Work:

Upon the completion of each annual portion of the project and the verification and auditing of all data collected by the Company, the Company shall enter the data into the computer system. Said computer system must be compatible with the Municipality's MicroSystems tax assessment

software and must contain MOD IV and CAMA file information for entering and use or must be converted at the Company's expense and submitted into the County system for the Assessor's review. Any cost relative to this provision is at the exclusive expense of the Company. Verification of the Company's system compatibility shall be demonstrated before the project is commenced and approved by the Assessor.

The Company shall include real property identification material on properly labeled individual property record cards in a format acceptable to and approved by the Assessor.

The information to be verified and collected on the property record card for each property shall include, but not necessarily be limited to:

- (1) A scaled sketch of the exterior building dimensions for residential properties, and non-residential properties if pursuant to an Added/Omitted inspection, or if the Municipality maintains sketches of non-residential properties in electronic format accessible by the Company.
- (2) Notations of significant building components;
- (3) Land and building characteristics, including number of units; and
- (4) Identification of the person making the inspection and whether an interior inspection was obtained.

The Company shall be responsible for the data collection and verification of all construction within the designated properties for each year. If a building is under construction at the time of the field investigation, a notation to that effect shall be placed on the computerized appraisal system so that it can be retrieved in an expeditious manner for further review.

At the discretion of the Assessor, the Company shall provide the Assessor with completed property record cards in electronic format and filed in sequence by block and lot numbers for all taxable and exempt properties. Property record files shall include all supporting data and documentation.

7. Project Completion; Program Progress Reports:

The Parties hereby recognize that completion of the project within a timely manner is essential. The Company has agreed to complete the project in accordance with the requirements of the Assessment Demonstration Program (P.L. 2013 c. 15) and/or such other applicable laws.

The Company shall submit a monthly status report outlining the project's progress to the Assessor for any month in which inspections have been completed, until completion and acceptance of the project.

8. Payment Schedule:

The Company shall submit a monthly invoice to the Municipality for any month in which inspections have been completed, within 5 days of the last day of each such month and return any payment vouchers provided by the Municipality. Payment shall be made by the Municipality within 30 days of each invoice.

Payment will be made for work completed, and billings properly filed and approved shall be processed and payment shall be mailed to the Company if found to be in order and approved.

Payments to be made to the Company under this Contract shall be calculated by applying the appropriate dollar value to the work completed and accepted by the Assessor for each payment period. The dollar values to be utilized are outlined in the Appendices attached hereto.

9. Insurance:

The Company shall provide Certificates of Liability and Worker's Compensation insurance providing coverage in accordance with the Municipality's insurance requirements, as set forth in the Project Specifications. Insurance coverage shall indemnify and hold the Municipality harmless from any and all liability arising from the Company's work (which shall not include property owner appeals of assessments assigned by the Municipality). The Company, at their own expense, should defend any suit which may be brought against the Municipality in connection with, or rising out of the services furnished hereunder.

The Company shall provide comprehensive general liability and automobile liability insurance coverage with the Municipality named as co-insured. Limits of liability for each coverage shall be a minimum of \$1,000,000 per person and \$1,000,000 per occurrence for bodily injury and \$250,000 property damage.

Copies of all insurance policies must be provided to the Municipality prior to the commencement of any work under this Contract.

10. Unsatisfactory Work:

If at any time during the Contract period the quality and/or progress of the Company's work shall not be satisfactory, the Municipality reserves the right to terminate the Contract upon thirty (30) days written notice directed to the principal place of business of the Company. This notice shall specify any work deficiencies on which termination is based and provide the Company with thirty (30) days to cure such deficiencies prior to termination being effective.

If either party violates the terms and conditions of this Contract in a manner not covered by the preceding paragraph, the other party shall have the unilateral right to terminate the Contract upon thirty (30) days written notice directed to the other party.

Upon a valid termination by either party, the Municipality shall be responsible only for the reasonable value of the services theretofore rendered, and in no event a sum greater than the ratio of completed work to the whole work contemplated by the Contract.

11. Interpretations of Specifications and Contract:

This Contract shall be construed pursuant to the laws of the State of New Jersey. Any litigation with respect to the interpretation of the terms of this Contract shall be within the sole jurisdiction of the Court of the State of New Jersey.

12. Confidential Nature of Project:

Disclosure of information, including pricing information or any information with respect to the Company's or Municipality's technology and processes, to any individual, company, or corporation, other than the Assessor, the Municipality, the Company and its employees or their authorized representatives is expressly prohibited, and if done before conclusion of this project will be considered a violation of the Contract and subject the party in violation to liquidated damages. It is understood that this does not refer to information released under due process of law, the Open Public Records Act, or consistent with public bidding processes.

13. Public Relations:

During this project, the Company and its employees will endeavor to promote understanding and amicable relations with taxpayers and the general public. The Parties will endeavor to orient and educate all interested persons as to the inspection project. Any informational

materials shall be presented to the Assessor prior to release. An initial mailing shall be made by the Company at its expense pursuant to Section 15 to all property owners prior to their scheduled inspections explaining the nature and purpose of the data collection program and notifying owners of the commencement of inspections in the Municipality.

The Municipality will publicize the project in advance of inspections to educate the public and maximize their cooperation and interior inspection/appointment rates, via website, newsletter or other available options.

The employees of the Municipality and the Company shall work together to maintain the full cooperation of all taxpayers by treating each inquiry with courtesy and supplying all necessary information within statutory requirements and limits to every interested taxpayer; however, each field inspector shall be instructed to refrain from discussions with the property owner, tenant, or occupant relating to property valuations, tax amounts or rates, or any related subjects. Any such inquiries will be directed to the Assessor.

14. Materials and Information To Be Provided:

The Municipality shall furnish the Company with the following:

- a) One (1) large and two (2) small copies of the up-to-date tax map (or sufficient digital maps) approved by the Director of the State of New Jersey Division of Taxation or his or her designate indicating the real estate assessment numbering system to assist field inspectors in locating properties; it should be noted that the tax maps may be "conditionally approved" which shall be considered acceptable for use in the valuation process.
- b) An electronic copy of the MOD IV file, and corresponding record layout from the Municipality's data custodian, of current property records for all properties currently listed upon the tax records of the Municipality. This electronic file shall include, but not be limited to, the block, lot, additional lots, owner's name and address, property location and property classification. The Municipality will also provide an outline and explanation of any unique data fields utilized by the Assessor to ensure that the Company's revision of property records does not interfere with such data fields.
- c) Letters of introduction to facilitate the Company's access to properties for inspection and data collection purposes.

15. Property Inspection:

At least three (3) weeks prior to their scheduled inspections, unless a different time frame is directed by the Assessor, the Company shall notify the current owners on file for each property within the Municipality (excluding Municipality-owned properties), by mail, that the Company will be conducting inspections, explaining the nature and purpose of the data collection program. The letter will come from the Tax Assessor's office at the Company's expense and must state that each property will be subject to an interior and exterior inspection and that there will be no further warning prior to the first inspection of the property. The letter will also provide contact information for the Assessor to field any specific questions. A copy of said letter must be submitted to the Assessor prior to being mailed.

This Contract requires the inspection and verification of all property exteriors and three (3) interior inspection attempts. The Company shall not be required to complete any exterior inspections of properties which are inaccessible, or any exterior or interior inspections when the property owner and/or occupant refuses inspector entry, with such properties being labeled accordingly for the Assessor and excluded from subsequent visits.

All exterior and interior inspection attempts must be conducted in-person by the Company's personnel and the Company shall not rely on mailings or other contacts with property owners for purposes of fulfilling the Company's inspection requirements hereunder. However, data may be collected directly from property owners in select circumstances, as permitted by the Assessor, such as cases in which an owner or occupant's health is not conducive to an interior inspection. Any violations of this provision will result in termination of the Contract by the Municipality.

A careful inspection of each parcel shall be made after 9:00 a.m. but before 7:00 p.m. on any day, Monday through Saturday. Second and third inspections may be scheduled with property owners for any day of the week, including Sunday, provided the property owner/occupant agrees to the appointment time and day.

If the owner/occupant is not available at the time of the first inspection, a calling card or "door tag" shall be left in a conspicuous place (not in a mail box) indicating that the field inspector has attempted to visit, requesting that the owner/occupant arrange for an interior inspection by either calling the telephone number provided or through the Company's internet-based appointment website. This card shall include information advising that the inspection is necessary for the Municipality to accurately assess their property.

In cases where no interior inspection is possible after three (3) attempts or an owner/occupant refuses to either set an appointment (in a reasonably designated time period) or allow entry to the premises, the Company shall make reasonable estimates of that property listing using standards promulgated by the New Jersey Division of Taxation. The estimate of a property shall not include the changing of interior data within the CAMA unless visually observed or approved by the Borough's Assessor. In no event shall a card be left requesting the owner/occupant to fill in information. The Company shall notify the Borough's Assessor in writing of these refusals and estimations by a monthly report.

The Company shall immediately notify the Assessor of any properties discovered not to be on the current tax list so as to permit adequate time to place an Added/Omitted assessment on the property.

The type of construction will be recorded by component parts such as, but not necessarily limited to, foundation, basement area, wall construction, roof, floors, interior finish, heating system, fireplaces, plumbing, fixtures, number of rooms and physical condition, as possible.

Each inspector shall record the name or code of the person making the inspection, the date of inspection, and obtain the signature of the occupant verifying that an interior inspection has been conducted. Actual interior inspection is required and at no time shall the property owner's description be accepted in lieu of inspection. The signature of the party present at the time of inspection shall be requested and be a part of the inspection documentation.

All properties within the Municipality must be inspected and verified during the term of the Contract, subject to the exceptions noted above, which shall include the initial term and extension.

The Company shall be responsible for identifying those properties subject to inspection in any given year, with the exception of properties identified for Added/Omitted inspections which shall be the responsibility of the Assessor.

Inspections of 20% of the Municipality's properties shall be completed on an annual basis, provided that the Company may inspect a greater or lesser number of properties during any calendar year upon the agreement of the Parties, and provided that (i) not less than 40% of the Municipality's properties are inspected during any contiguous two (2) year period, and (ii) all of the Municipality's properties are to be inspected during the full five (5) year inspection cycle.

Inspection data shall be electronically forwarded to the Municipality's data custodian at the completion of each annual portion of the project. Upon completion of a review by the Assessor, should discrepancies appear in the Company's data, the Company shall make the necessary corrections at its own expense.

The format of the property record data collection card shall be as indicated on the Monmouth County System (MOD IV and CAMA). The Assessor may make random spot checks throughout the Municipality to verify that inspections are being conducted in the appropriate manner. The Assessor or his designee may accompany Company employees at any time during field inspections.

16. Added/Omitted and Farmland Assessment Inspections; New Sketches

The Assessor shall provide the Company with notice by March 1 of each year in which it directs the Company to perform Added/Omitted and/or Farmland Assessment inspections, upon the terms provided in Appendices G and H, respectively. Such notice will indicate if the Municipality is directing the Company to create new, electronic sketches of any property classes, and include a preliminary list of properties for Added/Omitted inspections, if available.

Any Added/Omitted inspections shall pertain to all properties with outstanding permits, and in no circumstance will the Company perform inspections upon any subset of such permitted properties (with other Added/Omitted inspections being performed by the Municipality or third parties).

If the Municipality elects to have the Company perform its Added/Omitted inspections, it will furnish a final list of such properties (in a format provided by the Company, which may include entry via an online portal) by June 1 of each year. If the Municipality regularly updates its permit file in MOD IV, this file will be the required deliverable to the Company.

17. Computer Requirements:

The data collection of all properties must be computer generated so that the data can be integrated into the computer mass appraisal system (CAMA). The Municipality currently uses and will continue to use Micro Systems-NJ tax assessment software.

It shall be the Company's exclusive responsibility to ensure compatible and actual operation of any computer system that the Company may use.

The Real Property Appraisal Manual of New Jersey, Third Edition, Volumes I and II and any updates must be computerized for the purpose of generating computer data files for residential and commercial properties.

No distribution of any materials, with the exception of the MOD IV tape as required by the state, shall be permitted.

18. Digital Photography:

A new digital photograph will be taken by the Company, at its own expense, for all properties (no matter the class) using the Monmouth County photo naming convention for file indexing. Photographs shall be properly and correctly identified using a digital, color camera and shall be prepared using equipment that allows for the inclusion of the date and filename on each photograph. Photographs must be attached to the MOD IV and CAMA files for each property. Additionally, residential structures on the same parcel shall be separately photographed. Photos are not to be delivered by any other means unless agreed upon by the Borough Assessor.

19. Residential Data Collection:

For data collection relating to residential properties, the schedules shall contain all variations of wall construction, roofs, floors, heating, air-conditioning, plumbing, fireplaces, interior finish, finished attics, dormers, finished basements, built-ins, multi-family homes, decks, patios, porches, piers, piles and garages, the condition of which will be verified (or changed, if applicable) in each property record.

20. Commercial, Industrial and Apartment Data Collection:

For data collection relating to commercial, industrial and apartment properties, site improvements such as fencing, lighting, docks, and paving are to be recorded as accessory items, and the condition of each property's features will be verified (or changed, if applicable) in each property record.

21. Records and Computations to Become Property of Municipality:

On an annual basis, upon the conclusion of all property inspections and acceptable revisions, the Company shall meet with the Assessor upon his or her request to finalize all aspects of the project. The Company shall transmit to the custody of the Assessor (via the Municipality's data custodian) all data collected by the Company pursuant to the project if not previously provided. These records may include, but not necessarily be limited to:

- (1) Written statements to the public or group concerning the nature of the project;
- (2) Any letter or memoranda to individuals or groups explaining methods used in the data collection;
- (3) Data processing information pertaining to the format of the computer systems used in the project;
- (4) Pictures of properties as required by this Contract;
- (5) Records containing property data files which will be used in the development of the Assessor's certified tax list, in a format consistent with the New Jersey Property Tax System MOD IV; and
- (6) Any other records pertaining to the project.

22. Cost Proposal for 5-Year Inspection Plan (3-year award with one 2-year extension option):

In accordance with the Assessment Demonstration Program, and its implementation schedule promulgated by the Monmouth County Board of Taxation with the consent of the New Jersey Division of Taxation, providing a program for "Annual Qualified Reassessment to 100% of market value" supported by a five (5) year program for the inspection of all properties, the Company shall provide a schedule of fees relating to the cost of data collection and data verification via internal inspection in Appendix E.

23. Affirmative Action:

The Parties agree to incorporate into this Contract the mandatory language of subsection 3.4(a) of the regulations promulgated by the New Jersey State Treasurer pursuant to P.L. 1975, c. 127, as amended and supplemented from time to time, and the Company or subcontractor agrees to comply fully with the terms, provisions, and obligations of said subsection 3.4(a), provided that said subsection shall be applied subject to the terms of subsection 3.4(d) of said regulations.

The Parties agree to further incorporate into this Contract the mandatory language of subsections 7.4(a) and (b) of regulations promulgated by the Treasurer pursuant to P.L. 1975,

c. 127, as amended and supplemented from time to time, and the Company or subcontractor agrees to comply fully with the terms, provisions, and obligations of said subsections 7.4(a) and (b).

The Company shall execute and comply with all requirements contained in the Affirmative Action Affidavit attached hereto, which shall be incorporated herein by reference. The Company shall submit a copy of its Certificate of Employee Information Report or Form AA-302 (Initial Employee Information Report) prior to any payments being made under this Agreement.

The Parties, for themselves, their heirs, executors, administrators, successors, or assigns, hereby agree to the full performance of the covenants herein contained.

24. Americans With Disabilities Act of 1990:

The Company agrees to comply with the "Americans With Disabilities Act of 1990", which shall be incorporated herein by reference.

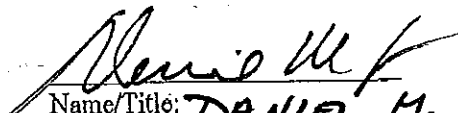
IN WITNESS WHEREOF, for good and valuable consideration, the sufficiency of which is hereby acknowledged, the Parties have executed this Contract with an effective date this 25th day of SEPTEMBER, 2019.

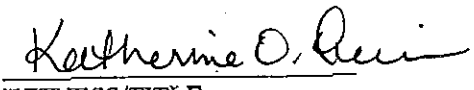
BOROUGH OF ENGLISHTOWN


Name/Title: Thomas Reynolds-Mayor


WITNESS/TITLE:

REALTY DATA SYSTEMS LLC


Name/Title: **DANIEL M. KELLY**
MEMBER


WITNESS/TITLE:
Katherine O. Quinn
Project Administrator

APPENDIX A

BOROUGH OF ENGLISHTOWN
PROPERTY CLASSIFICATION SUMMARY
2019 TAX YEAR

<u>CLASS PROPERTY CLASSIFICATION</u>	<u>NUMBER OF LINE ITEMS</u>
1 VACANT LAND	23
2 RESIDENTIAL (4 FAMILY OR LESS)	613
3A FARM REGULAR	0
3B FARM QUALIFIED	0
4A COMMERCIAL	44
4B INDUSTRIAL	5
4C APARTMENTS/MULTI FAMILY	2
15A EXEMPT PUBLIC SCHOOL	2
15B EXEMPT OTHER SCHOOL	0
15C EXEMPT PUBLIC PROPERTY	28
15D EXEMPT CHARITABLE	9
15E EXEMPT CEMETERIES	1
15F EXEMPT MISC.	2
TOTAL	729

APPENDIX B

BOROUGH OF ENGLISHTOWN

LIST OF SUPERVISOR(S) TO BE RESPONSIBLE (IN CHARGE) OF ENTIRE PROJECT*
(PROVIDE SEPARATE SHEET, IF NEEDED)

Daniel Kelly, Project Manager

Ivan Hollister, Field Supervisor

Brandon Sherwood, Field Supervisor

APPENDIX C

(TO BE SUBMITTED ONLY UPON AWARD OF CONTRACT)

BOROUGH OF ENGLISHTOWN

BACKGROUND INVESTIGATION RELEASE

POLICE DEPARTMENT CONSENT FORM

The undersigned hereby authorized the Municipality or any of their agents, representatives, or employees to obtain information concerning my personal background, including my driving record or any criminal record I may have, whether by utilizing the resources of the Federal and State governments (including but not limited to the NCIC and SCIC computer networks) or any other investigative sources.

Alternatively, the Company is providing completed background checks to the Assessor and the Municipality's Police Department, as required.

NAME (PLEASE PRINT OR TYPE)

DRIVER LICENSE NUMBER

LICENSE PLATE #

VEHICLE MAKE / MODEL

SIGNATURE

WITNESS

APPENDIX D

BOROUGH OF ENGLISHTOWN

SCHEDULE OF COMPLETION AS PER THE REQUIREMENTS OF THE ASSESSMENT
DEMONSTRATION PROGRAM
S1213-A1591 (P.L. 2013, c.15)

ASSESSMENT FUNCTION

DUE DATE/RESPONSIBLE PARTY

Annual Completion and Submission of Data Collection and Verification for (a)	December 31 / Company
Completion and Submission of Data Collection and Verification for <u>Added/Omitted Properties</u> , as provided by the Assessor by June 1 (b)	September 1 / Company
Completion and Submission of Data Collection and Verification of <u>Farmland Assessments</u> (if applicable)	September 1 / Company
Submission to the Company of Final Added/Omitted Property List by the Assessor (or MOD IV Permit File, if updated/available)	June 1 / Assessor
Submission to the Company of election for Added/Omitted and/or Farmland Inspections	March 1 / Assessor
Mailing of Notification Cards to Property Owners	Minimum two (2) weeks prior to commencement of inspections / Company (c)
Submission to the Assessor of Pre-Inspection Requirements: Notification Mailings, Door Tags, Background Checks and Insurance Certificates.	Prior to the commencement of inspections / Company

(a) Subject to the provisions and exceptions set forth in Section 15.

(b) Due Date only applicable to Added and Omitted property lists provided to the Company by June 1.

(c) Unless a different time frame is directed by the Assessor pursuant to Section 15.

APPENDIX E

BOROUGH OF ENGLISHTOWN
COST PROPOSAL FOR INTERNAL INSPECTION PLAN

Please provide the Company's fees of data collection and data verification via internal inspection.

CLASS

1	VACANT LAND	\$ <u>30</u> PER PARCEL
2	RESIDENTIAL (4 FAMILY OR LESS)	\$ <u>30</u> PER PARCEL
3A	FARM REGULAR	\$ <u>N/A</u> PER PARCEL
3B	FARM QUALIFIED	\$ <u>N/A</u> PER PARCEL
4A	COMMERCIAL	\$ <u>30</u> PER PARCEL
4B	INDUSTRIAL	\$ <u>30</u> PER PARCEL
4C	APARTMENTS	\$ <u>30</u> PER PARCEL
15A	EXEMPT PUBLIC SCHOOL	\$ <u>30</u> PER PARCEL
15B	EXEMPT OTHER SCHOOL	\$ <u>N/A</u> PER PARCEL
15C	EXEMPT PUBLIC PROPERTY	\$ <u>30</u> PER PARCEL
15D	EXEMPT CHARITABLE	\$ <u>30</u> PER PARCEL
15E	EXEMPT CEMETERIES	\$ <u>30</u> PER PARCEL
15F	EXEMPT MISC.	\$ <u>30</u> PER PARCEL

APPENDIX F

BOROUGH OF ENGLISHTOWN COST SUMMARY FOR ADDED/OMITTED ASSESSMENT INSPECTION SERVICES

Please provide the Company's fees for inspection/data collection associated with Added/Omitted Assessments, including any sub-categories within each property class.

Class 2 Residential Properties: **\$ 35.00**

New Construction	\$ 60.00
New Construction over 4,000 SF	\$ 80.00

Class 4A Commercial Properties: **\$150.00**

New Construction	<15,000 SF	\$200.00
	>15,000 SF	\$300.00

Class 4B Industrial Properties: **\$200.00**

New Construction	<15,000 SF	\$250.00
	>15,000 SF	\$400.00

Class 4C Apartment Houses:

5-20 Families Inclusive	\$250.00
21-50 Families	\$500.00
+50 Families	Separate Agreement

- All inspections require digital photography date-stamped and encoded with the parcel identification in accordance with the Monmouth County indexing convention.
-

APPENDIX G

BOROUGH OF ENGLISHTOWN
COST SUMMARY FOR FARMLAND ASSESSMENT INSPECTION SERVICES

Please provide the Company's fees for inspection and data collection associated with Farmland Assessments.

CLASS

3B FARM QUALIFIED

\$ N/A PER PARCEL

ADDITIONAL INFORMATION

16. Listing of Subcontractors: None

17. List of Key Employees

Our Professionals

Please note that bios for our Office and Field Staff can be found on our website at www.rdsnj.com. All field staff have extensive experience completing real property data collection and verification services in multiple municipalities across all property classes.

Consistent with our firm's mission to employ veterans, a majority of our positions since the firm's founding have been filled by military and law enforcement veterans, or by personnel who have worked on behalf of veteran organizations.

Michael Panter, Esq.

Michael Panter has been an attorney, investment banker and corporate executive in New Jersey and New York since 1995. Prior to forming RDS in 2013, he handled tax assessment cases relating to more than 400 properties and is the co-founder of an investment advisory firm overseeing pension and foundation assets on behalf of private hospital systems.

He was a member of the New Jersey State Assembly from 2004-2008, representing the 12th Legislative District in Monmouth and Mercer Counties. His efforts have been featured in national publications ranging from the *New York Times* to *Stars and Stripes*, and he has appeared on programs such as NPR's *All Things Considered* and Fox News Channel's *Hannity & Colmes*.

Michael earned his Bachelor of Arts *magna cum laude* from Syracuse University where he was elected to Phi Beta Kappa, and his Juris Doctorate from Harvard Law School.

He is involved in a variety of community and charitable activities.

Neil Rubenstein - SCRREA, C.T.A.

Neil Rubenstein has been a practicing appraiser of real estate for more than 30 years. He has spent a significant portion of his career engaged in data collection and the mass appraisal field, specifically as it relates to municipal revaluations. He has supervised projects for all types of municipalities, including urban centers, suburban communities, and rural districts.

Neil is a Certified Appraiser and Certified Tax Assessor and serves as Tax Assessor in the Township of Haworth, NJ.

He received his Bachelor of Arts from Muhlenberg College and has continued his education in a variety of tax assessment and real estate appraisal programs through Rutgers University, the NJ Division of Taxation and the Appraisal Institute of Real Estate Appraisers.

Both Neil and Steven Rubenstein have also completed multiple revaluations/reassessments in the Borough and are very familiar with its properties.

Steven Rubenstein - MAI, SCGREA, C.T.A.

Steven Rubenstein has been appraising property and performing data collection services since 1986. He has given testimony before the county tax boards of Monmouth, Middlesex, Morris, Bergen, Passaic, Hudson, Sussex, and Ocean Counties, as well as before the Tax Court of New Jersey.

Steven is a Certified Tax Assessor and Certified General Appraiser and is a member of the Appraisal Institute and Bergen County Association of Assessors. He has served as a guest speaker and panelist at numerous conferences and boards, and as the Tax Assessor for the Township of Glen Rock, NJ and Wood-Ridge Township, NJ.

Steven graduated from Boston University and has continued his education through a variety of seminars and courses given by the Appraisal Institute of Real Estate Appraisers.

Daniel Kelly, C.T.A.

Dan Kelly has been involved in the financial industry in a wide range of capacities for more than 30 years and served as a Commissioner on the Monmouth County Board of Taxation from 2005 through 2013, including a term as the Board President.

Dan is a Certified Tax Assessor, the co-founder of an investment firm specializing in hospital pension plan and foundation management, and previously served as the Chief Operating Officer and head of fixed income for a national advisory firm.

He is an active volunteer with many youth sports programs and charitable organizations, in addition to his local school system and church, and serves as the President of his local fire company.

Brandon Sherwood

Brandon Sherwood serves as a Field Supervisor and technology professional for RDS and has been engaged in the fields of construction and property management in New Jersey since 2002. He has served as a field supervisor and inspector for Realty Appraisal and RDS for more than eight (8) years.

Brandon has overseen revaluation, reassessment and annual property inspection projects in a variety of municipalities in both Monmouth and Middlesex Counties, and is a current Certified Tax Assessor candidate.

18. List of Current data collection projects under contract, with completion dates

Aberdeen Township	2018
Allenhurst Borough	2019
Asbury Park City	2018
Atlantic Highlands	2023
Bradley Beach Borough	2019
Brielle Borough	2019
Colts Neck Township	2018

Eatontown Borough	2020
Englishtown Borough	2018
Fair Haven Borough	2018
Farmingdale Borough	2019
Freehold Borough	2021
Freehold Township	2022
Hazlet Township	2018
Highlands Borough	2021
Holmdel Township	2018
Howell Township	2023
Interlaken Borough	2023
Keyport Borough	2019
Little Silver Borough	2023
Loch Arbour Village	2018
Manalapan Township	2023
Matawan Borough	2018
Monmouth Beach	2019
Neptune Township	2019
Neptune City	2019
Red Bank Borough	2020
Roosevelt Borough	2023
Rumson Borough	2023
Sea Bright Borough	2020
Sea Girt Borough	2019
Shrewsbury Borough	2023
Shrewsbury Township	2018
Spring Lake Heights	2021
Tinton Falls Borough	2023
Union Beach Borough	2019
Upper Freehold Township	2019
West Long Branch Borough	2023

19. List of data collection proposals submitted to municipalities within the past six months, with completion dates Aberdeen (2023); Monmouth Beach (2024). All other proposals submitted in the past six months are included or excluded as active projects above.
20. Copies of Financial Statements from the last two years: Attached below
21. Vendor's acknowledgement of receipt of any notices or addenda to advertisements, specifications or proposal documents: None
22. State of NJ Business Registration Certificate: Attached below
23. A statement of whether any litigation involving the firm has occurred during the past five years and, if so, explain in detail the nature of such litigation and the results thereof.

The firm brought litigation against a municipality in 2015 based on a claim for unpaid fees/ breach. This matter was settled in February 2017.

That litigation did not relate to the firm's performance.

24. List of property inspection and data collection projects performed within the past 5 years and highlight and such that were performed in Monmouth County. Included above. The firm has also performed inspection projects for four additional Monmouth municipalities (not listed above) that are currently inactive or the subject of pending bids.
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COPIES OF FINANCIAL STATEMENTS

Realty Data Systems LLC
Profit & Loss
January through December 2017

	<u>Jan - Dec 17</u>
Ordinary Income/Expense	
Income	
Sales Income	<u>676,677.36</u>
Total Income	<u>676,677.36</u>
Gross Profit	676,677.36
Expense	<u>649,277.44</u>
Net Ordinary Income	27,399.92
Other Income/Expense	
Other Income	<u>120,041.13</u>
Net Other Income	<u>120,041.13</u>
Net Income	<u><u>147,441.05</u></u>

Realty Data Systems LLC
Profit & Loss
January through December 2018

	<u>Jan - Dec 18</u>
Ordinary Income/Expense	
Income	
Sales Income	<u>724,951.85</u>
Total Income	<u>724,951.85</u>
Gross Profit	724,951.85
Expense	<u>647,744.81</u>
Net Ordinary Income	77,207.04
Other Income/Expense	
Other Income	<u>39,501.56</u>
Net Other Income	<u>39,501.56</u>
Net Income	<u><u>116,708.60</u></u>

Expenses include member salaries and associated taxes.

Realty Data Systems LLC
Balance Sheet
As of July 8, 2019

	<u>Jul 8, 19</u>
ASSETS	
Current Assets	92,124.09
Fixed Assets	<u>587,034.17</u>
TOTAL ASSETS	<u><u>679,158.26</u></u>
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	9,789.51
Long Term Liabilities	<u>382,848.87</u>
Total Liabilities	<u>402,618.18</u>
Equity	<u>276,560.08</u>
TOTAL LIABILITIES & EQUITY	<u><u>679,178.26</u></u>

STATE OF NJ BUSINESS REGISTRATION CERTIFICATE

02/20/18

Taxpayer Identification# 461-957-803/000

Dear Business Representative:

Congratulations! You are now registered with the New Jersey Division of Revenue.

Use the Taxpayer Identification Number listed above on all correspondence with the Divisions of Revenue and Taxation, as well as with the Department of Labor (If the business is subject to unemployment withholdings). Your tax returns and payments will be filed under this number, and you will be able to access information about your account by referencing it.

Additionally, please note that State law requires all contractors and subcontractors with Public agencies to provide proof of their registration with the Division of Revenue. The law also amended Section 92 of the Casino Control Act, which deals with the casino service industry.

We have attached a Proof of Registration Certificate for your use. To comply with the law, if you are currently under contract or entering into a contract with a State agency, you must provide a copy of the certificate to the contracting agency.

If you have any questions or require more information, feel free to call our Registration Hotline at (609)292-9292.

I wish you continued success in your business endeavors.

Sincerely,



James J. Fruscione
Director
New Jersey Division of Revenue

STATE OF NEW JERSEY BUSINESS REGISTRATION CERTIFICATE		DEPARTMENT OF TREASURY DIVISION OF REVENUE PO BOX 252 TRENTON, N J 08646-0252
TAXPAYER NAME: REALTY DATA SYSTEMS LLC	TRADE NAME:	
ADDRESS: 2 MAJESTIC AVE STE 2 LINCROFT NJ 07738	SEQUENCE NUMBER: 1776643	
EFFECTIVE DATE: 02/26/13	ISSUANCE DATE: 02/20/18	
 Director New Jersey Division of Revenue		