## 65 Morristown Rd.

## Kalian Management

## Kalian Management

2 Hennessey Blvd Atlantic Highlands, NJ 07716 (732)741-0054

Mazin Kalian President(732) 713-9001

mkalian@kalian.com

Tyler Kalian Vice President (732)687-2073

tkalian@kalian.com

Austin Schneider Managing Director 201-376-0199

aschneider@jkarch.com

## Dear Borough of Bernardsville -

Our team of professionals has had the following experience:

- 100+ years of combined Real Estate Development experience
- 100+ Redevelopment Projects
- 10,000+ Units delivered

Kalian aims to bring a new boutique apartment and retail building to this section of Bernardsville that will blend seamlessly with the fabric of this storied borough. Because it is in a largely business and commercial district we feel it is an opportunity for a transitional building that is Residential with Retail on the ground floor. We are proposing a building consisting of Rental Apartment units above Retail. The building will have a traditional Façade Consisting of mostly brick with some Cementitious Plank Siding. The majority of the residential will exist in two floors above the retail space and there will also be a "pop-up" residential floor at the backside of the building with units. This pop-up will be set back and therefore barely be visible from the street. This layout will allow for more gracious, larger, brighter apartments. The building will have 2 parking spaces for each residential unit as well as 4 spaces for the Retail. Depending on the ultimate usage of the residential parking some more of this may be given to the retail. We have found that actual usage by residential tenants is less than 2:1. The tax rateables generated by this building will be far above what they are today as detailed in this presentation. We are excited at the anticipation of working with the Borough and completing this project quickly and effectively to restore the property into something we all can be proud of.

Sincerely,

The Kalian Management Team

## Target Market:

The target market will largely resemble that of other similar projects we have built recently in communities such as Red Bank and Atlantic Highlands. We have found that a lot of our tenants are Empty Nesters who are from the area, have children locally but have since sold their larger home and have often bought second homes elsewhere. Another group that we have experienced moving into these buildings are young professionals, often those who grew up in this and surrounding towns that are now moving back from NYC or other cities but who do not yet have the desire or wherewithal to purchase a home. These are our two anticipated groups but obviously it goes without saying that we are open to any and all

## Market Feasibility:

We have used data from prior similar projects as well as local comparable rents to do a full underwriting and proforma to determine the Market Feasibility of this project. We are able to build luxury apartments which will command rents that are commensurate with the area and therefore are able to sustain the building and the associated costs of running it and keeping it in top condition.

## **Purchase Price:**

The Purchase Price for the Property shall be assuming the approval of Total units, of which will be Market Rate and of which will be Affordable.

## Commitment and Project Readiness:

Kalian will use all best efforts to move the project forward as expeditiously as possible. We intend to close just as soon as all non-appealable governmental approvals are complete. We anticipate a total project schedule as follows:

- Conceptual Plan Refinement:
- Named as Redeveloper
- Fully Engineered Site Plan Completion:
- Approvals Meetings:
- Close on Property
- Construction Drawings for Permitting:
- \* Construction of New Building:
- Building Complete



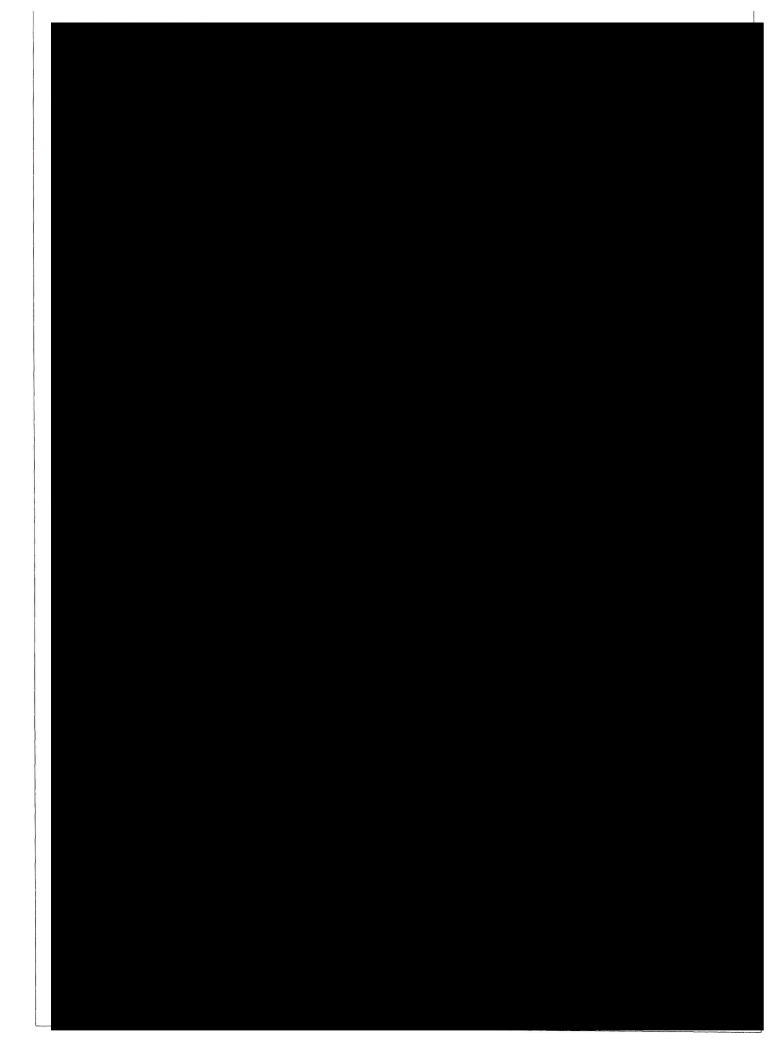
## Financial Capacity:

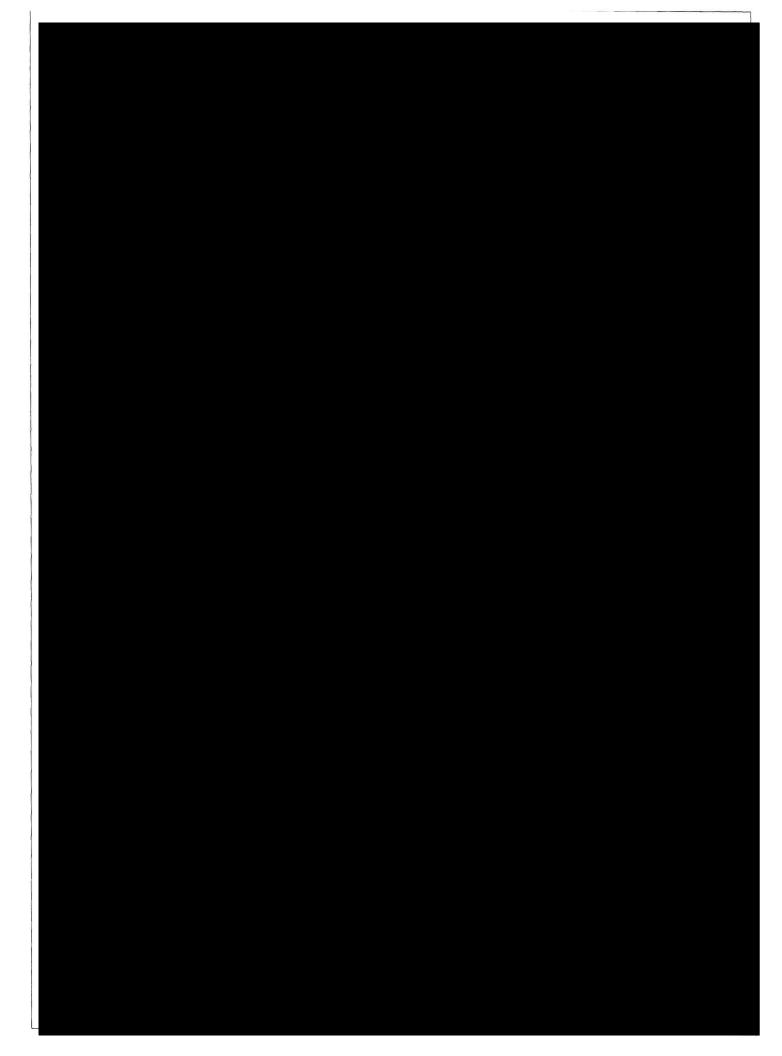
Kalian Represents that we have the Financial Capacity to complete this project. The capital needed to complete this project will be obtain Construction Loans is predicated on over 40 years of experience and reputation with over 10,000 Units built and therefore an excellent credit rating.

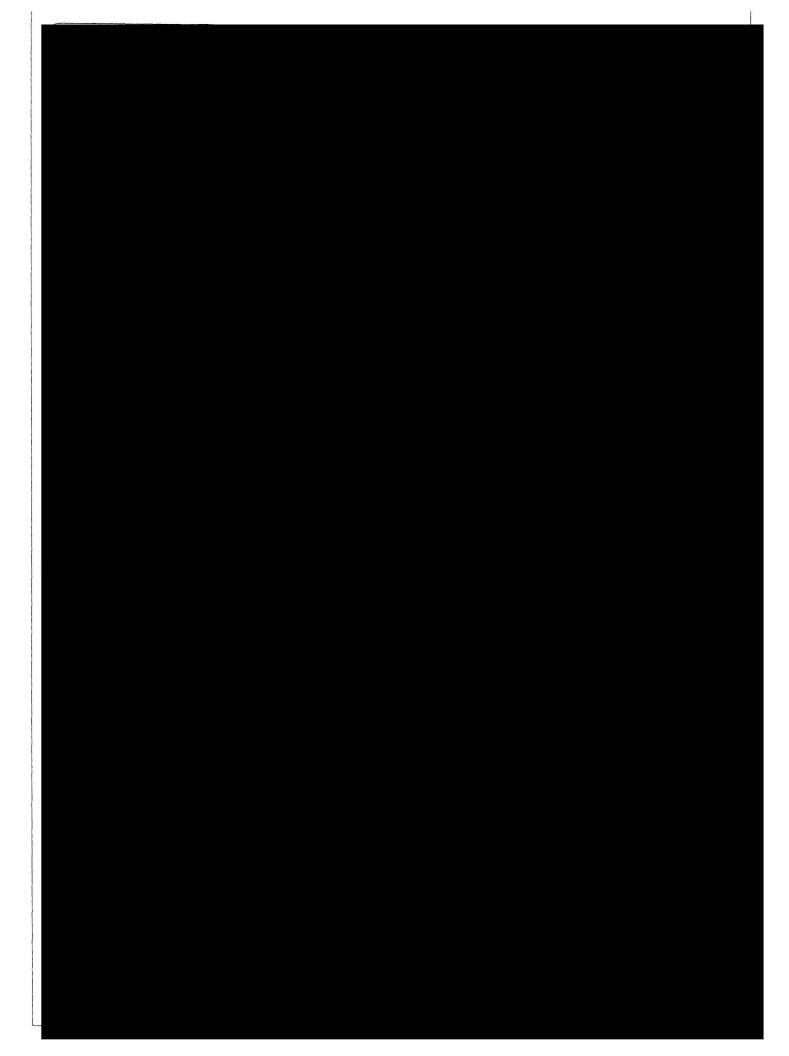
Sincerely,

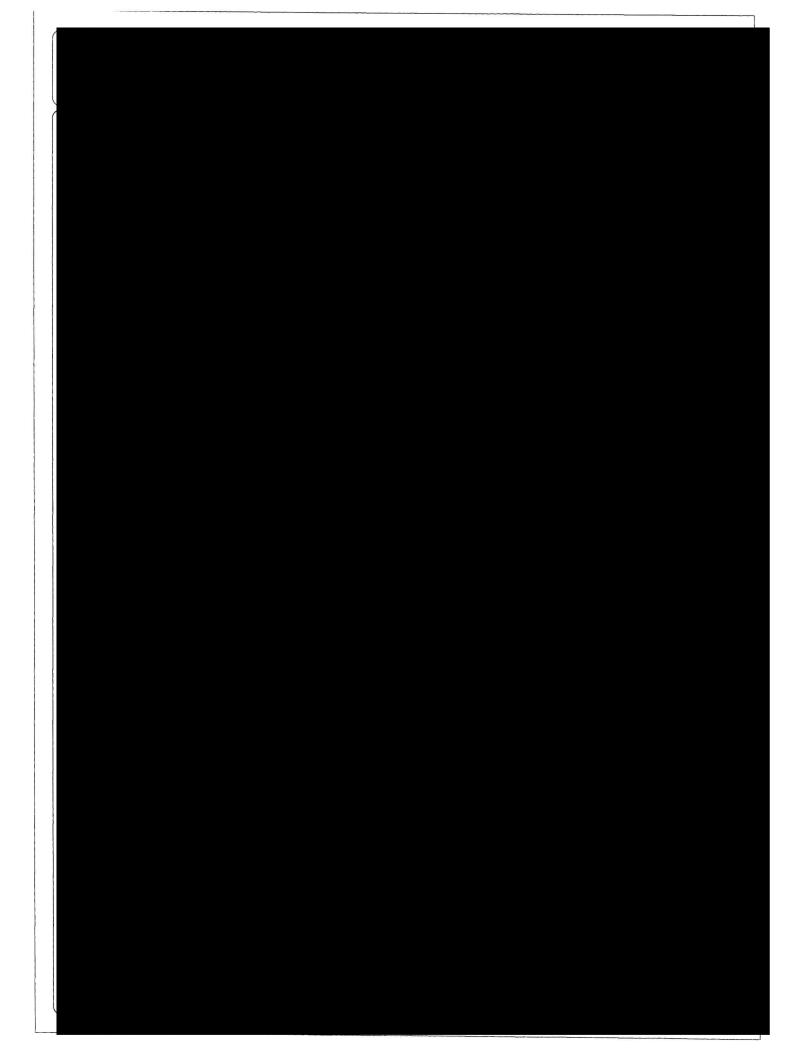
Kalian Management LLC













## FISCAL IMPACT AND SCHOOL-AGE CHILDREN ANALYSIS

Prepared for:

Kalian Companies

Prepared by:

Cofone Consulting Group 125 Half Mile Road, Suite 200 Red Bank, New Jersey 07701

May 2024

The original of this report was signed and sealed in accordance with N.J.A.C 13:41-1.2

Christine A. Nazzaro-Cofone, AICP, PP New Jersey Professional Planner License #5517

## Introduction

This report has been prepared in support of Kalian Companies' submission pursuant to Request for Qualifications and Proposals Redevelopment Project in the Borough of Bernardsville, Somerset County, New Jersey ("RFQP") Specifically, RFQP Section F, "Fiscal Impact" requires "an overview of the expected fiscal impact on the Borough and the region including tax ratables and other direct and indirect financial benefits during construction and upon project completion." Additionally, Section D "Development Approach" subsection VII, requires a projection of a number of school-age children residing in the project.

Accordingly, this report analyzes the net fiscal impact of a proposed 28,639 square foot mixed-use development at Block 125, Lot 13 upon municipal services and public school education in Bernardsville Borough, New Jersey. The methodology used to conduct the study is known as the per capita multiplier method, as set forth in the Urban Land Institute's *Development Impact Assessment Handbook*. This approach uses an average costing technique to project annual revenues and costs assignable to the development.

## Summary of Findings

Based on the findings of this analysis, and as demonstrated in the summary table below, it is projected that the proposed development will provide annual net *surplus* revenues to Bernardsville Borough and the Somerset Hills Regional School District.

Cost / Revenue Summary
Proposed 28,639 SF Mixed-Use Retail and Residential Development

	<b>COST</b>	REVENUE	<b>NET IMPACT</b>
Bernardsville Municipal Services	\$ 62,524	\$ 64,154	\$ 1,630 +
Somerset Hills Regional High School District	\$ 135,576	\$ 158,202	<u>\$ 22,626</u> +
TOTAL	\$198,100	\$222,356	\$ 24,256+

As noted above, the proposed development would yield a net *positive* fiscal impact to Bernardsville Borough for municipal services and for public school education. Bernardsville Borough could anticipate an initial annual net *surplus* of approximately \$1,630 for municipal services, while the Somerset Hills Regional School District would see an initial annual net *surplus* of \$22,262.

<sup>&</sup>lt;sup>1</sup> Robert W. Burchell, David Listokin, William R. Dolphin, Lawrence Q. Newton and Susan J. Foxley, Washington, DC, 1994.

## The Proposal

The proposed development is mixed-use with an overall gross building area of 28,639 square feet. Based upon current market conditions, the project developer estimates that the overall development will have a market value of \$13,500,000.

## Methodology

The per capita multiplier approach is used in this analysis. This approach involves the determination of the average cost to serve each employee within a development on a per capita basis. If it costs more to serve a proposed employee population than is generated in property tax revenue, the development is said to have a net *negative* fiscal impact. If it costs less to serve a proposed employee population than is generated in property tax revenue, the development is said to have a net *positive* fiscal impact.

## Fiscal Impact Analysis

This analysis evaluates the expected employee population and projected assessed value of the proposed development in the Borough of Bernardsville; the tax revenue that the project would generate; the costs associated with any new population or employees; and, the net positive or negative fiscal impacts on the municipal services and public school education.

Table 2 presents the official 2023 tax rate apportionment for the Borough of Bernardsville.

Table 2

2023 Tax Assessment Data Borough of Bernardsville, New Jersey

County Open Space Total	0.030
County Services	0.298
Public Schools (K-12)	1.159
Municipal Library	4,368
Municipal Open Space	0.020
Municipal Services	0.470

\* per \$100 Assessed Valuation (equalized) (2024 Municipal Budget has not yet been adopted)

## Generated Revenue

As noted previously, the estimated market value for the proposed development is \$13,500,000. Based upon the current equalization rate for Bernardsville Borough (101.11%) the total assessed value for the proposed development is estimated to be \$13,649,850 [\$13,500,000 x 1.0111 = \$13,649,850]. Table 3 (next page) summarizes the anticipated revenue generated by the proposed development, based upon the total equalized value and apportionment of the Borough's property taxes. As shown, the proposed project would generate \$64,154 in tax revenue for municipal services and \$158,202 for public school education. Additional revenues would also be generated for Municipal open space (\$2,730), and Municipal library (\$4,368) and a total of \$44,771 for various county-level services, including the County's open space program.

Table 3
Projected Tax Revenue

	2023 Tax		
	Rates*	R	evenue
Total Market Value		\$1.	3,500,000
Assessed to true value ratio (2023)		j	101.11%
Estimated Assessed Value (equalized)		\$1.	3,649,850
Municipal Services	0.470	\$	64,154
Municipal Open Space	0.020	\$	2,730
Municipal Library	0.032	\$	4,368
Public Schools (K-12)	1.159	\$	158,202
County Services	0.298	\$	40,677
County Open Space	0.030	_\$	4,095
Total	2.009*	\$	274,225

<sup>\*</sup> per \$100 Assessed Valuation (equalized)

## Municipal Costs

In order to establish the costs of the proposed development on the Borough of Bernardsville, the Borough's assessed valuations were apportioned (residential vs. non-residential) as described in the *Development Impact Assessment Handbook*. According to Burchell et al. (1994), "... it is incorrect simply to divide the incurred outlays by the local population because such services benefit both residential and non-residential land uses. Service costs must therefore be apportioned between these two types of development."<sup>3</sup>

As with any technique of this type, certain assumptions are inherent. According to Burchell, et al., the proportional valuation approach assumes that relative real property values represent shares of municipal costs. The share of Bernardsville's budget attributable to residential and non-residential property was determined by obtaining the Borough's aggregated assessed valuations by land use type. Once these numbers were obtained, the proportion of the total assessment attributable to residential and non-residential uses could be calculated. Table 4 summarizes the pertinent data.

4

<sup>&</sup>lt;sup>2</sup> Burchell, Listokin, Dolphin, et al., the Urban Land Institute, 1994.

<sup>&</sup>lt;sup>3</sup> Burchell et al. (1994, pp. 11).

## Table 4 Budget and Valuation Data Borough of Bernardsville, New Jersey

Bernardsville Total Municipal Budget:	\$17,726,301 Bernardsville Bord Budget, 2023		
Revenue derived from local property tax in support of the Municipal Budget for municipal services:	\$12,266,247	Bernardsville Borough Budget, 2023	
2023 Valuation Data (land use class):	<u>Parcels</u>	<u>Valuation</u>	
Vacant (1)	133	\$ 21,036,600	
Residential (2)	2,524	\$ 2,035,664,500	
Farm (3A)	100	\$ 179,112,700	
Farm (3B)	157	\$ 813,600	
Commercial (4A)	156	\$ 173,872,000	
Industrial (4B)	25	\$ 17,631,200	
Apartment (4C)	5	\$ 9,083,700	
Total	3,100	\$ 2,473,214,300	
Percentage Residential (2/4C)	81.58%	82.67%	
Percentage Commercial (2/4C)	5.83%	7.74%	

As demonstrated above, residential parcels make up 81.58 percent of the total parcels and 82.67 percent of the total assessed valuation in the Borough of Bernardsville. In order to determine the total cost to provide municipal services to the residential sector of the Borough, we average the percentage of residential parcels (81.58%) and the residential valuation (82.67%) to derive an average factor of 82.47 percent  $[(81.58 + 82.67) \div 2 = 82.12\%]$ .

This calculated residential average factor (82.12%) is then multiplied by the portion of the municipal budget derived from local property tax revenue (\$12,266,247). As a result, the calculated cost to provide municipal services to residential development in the Borough derived through local property tax is \$10,115,973 [ $$12,266,247 \times .8212 = $10,073,042$ ].

According to the latest information provided by the United States Census Bureau, the total population residing in Bernardsville Borough in the year 2020 was 7,893 people. To calculate the cost per resident, the calculated cost to provide municipal services to residential development

(\$10,073,042) is divided by the total population for a total cost of \$1,276 per person [\$10,073,042  $\div$  7,893 = \$1,276].

To determine the costs to provide municipal services to the proposed residential portion, the calculation is the total expected population of 49 multiplied by \$1,276, totaling \$62,524 (see Table 5 below for population generation).

Table 5

Anticipated Total Population Generation for Multi-Family Apartments

Ų	Init Type		Number of Units	Total Persons Multiplier	Anticipated Total Population	Total	Actual Total (Rounded)
5-49 Units (F	Rent), 0-1 Bedro	oom					(Frontigod)
All Values			2	1.568	3.136	- 1	
Below Median	\$	119,000	0	1.479	5.150		
Above Median	\$	119,000	2	1.662	3.324	3.32	
5-49 Units (	(Rent), 2 Bedro	om				5.02	
All Values		ì	17	2.512	42.704		
Below Median	\$	185,000.00	2	2.660	5.32		
Above Median	\$	185,000.00	15	2.359	35.385	40.71	41
5-49 Units	(Rent), 3 Bedroo	om I				10.11	71
All Values		1	1	3.571	3.571		
Below Median	\$	178,000.00	1	3.722	3.722		
Above Median	\$	178,000.00	o	3.406	0.722	3.72	4
<b>Total Anticipated Populat</b>	ion Generation	for Multi-Family (	non age-restricted) Un	its	- 1	5.72	49

\* Based on values supplied by the updated 2018 "Who Lives in New Jersey Housing? New Jersey Demographic Multipliers" published by The Rutgers University Center for Urban Policy Research in "Table II-A-1. Statewide New Jersey Total Persons By Age (Continued) (Newer housing units built 2000-2016, from 2012-2016 ACS)"

Additionally, commercial parcels make up 5.83 percent of the total parcels and 7.74 percent of the total assessed valuation in the Borough of Bernardsville. In order to determine the total cost to provide municipal services to the commercial sector of the Borough, we average the percentage of commercial parcels (5.83%) and the commercial valuation (7.74%) to derive an average factor of 6.78 percent  $[(5.83 + 7.74) \div 2 = 6.78\%]$ .

This calculated commercial average factor (6.78%) is then multiplied by the portion of the municipal budget derived from local property tax revenue (\$12,266,247). As a result, the calculated cost to provide municipal services to commercial/industrial development in the Borough derived through local property tax is \$831,652 [\$12,266,247 x 0.0678 = \$831,652].

The final step to determine the per-person cost of development is to divide the estimated non-residential associated expenses (from local sources) by the total employment population (jobs) in the Borough. The New Jersey Department of Labor publishes municipal-level quarterly covered

employment (jobs) for the private and public sector.<sup>4</sup> For December 2022 (latest available data), the New Jersey Department of Labor estimates that there were 3,249 average annual covered public and private sector jobs in the Borough of Bernardsville. Assuming that the Borough spent \$831,652 (from local sources) to service non-residential uses, one can conclude that per capita cost for municipal services to the non-residential uses is approximately \$256 for municipal services [\$831,652  $\div$  3,249 jobs = \$256].

To determine the costs to provide municipal services to the proposed development, it is then necessary to estimate the number of employees (jobs) that would be created by the proposed development. Based upon the use of the Uniform Construction Code Use Group Classifications as a guide for the projected number of employees, it is estimated that 7 employees would be generated by the proposed 4,000 square feet of retail. Table 6 presents a breakdown for the projected number of employees by functional use.

Table 6
Estimates of Employees (Industry Standards)

	Employees/1,000 sf <sup>5</sup>	No. of Employees
Retail Space	1.7	6.8
TOTAL		7

As shown above, based upon industry standards, 7 employees would be generated by the proposed commercial portion of the development. Accordingly, the cost to provide municipal services to the development would be \$1,792 annually [7 employed persons x \$256/employee = \$1,792].

## School District Costs

According to the latest data available from the New Jersey Department of Education, the 2023-24 budgeted cost per pupil is \$22,904, with 74% of the revenue in support of each pupil derived from municipal taxes, according to the 2023-2024 Regional School Budget. Therefore, the municipal tax support cost is \$16,947 for each student, and the estimated addition of 8 public school-age children would result in a cost of \$135,576 (see Table 7 below for public school-age children generation).

<sup>&</sup>lt;sup>4</sup> New Jersey Department of Labor and Workforce Development, Quarterly Census of Employment and Wages (QCEW), December, 2022...

<sup>&</sup>lt;sup>5</sup> Based upon Uniform Construction Code (UCC) Use Group classifications

Table 7

Anticipated School-age Children Generation for Multi-Family Apartments

<u>L</u>	Init Type		Number of Units	Total SAC Multiplier	Anticipated SAC Population	<u>Total</u>	Actual Total (Rounded)
5-49 Units (F	Rent), 0-1 Be	droom					
All Values			2	0.127	0.254		
Below Median	\$	119,000	o	0.111	0		
Above Median	\$	119,000	2	0.143	0.286	0.29	
5-49 Units	(Rent), 2 Bed	Iroom					
All Values			17	0.368	6.256		
Below Median	\$	185,000.00	2	0.492	0.984		
Above Median	\$	185,000.00	15	0.239	3.585	4.57	
5-49 Units	(Rent), 3 Bed	room					
All Values			1	0.995	0.995		
Below Median	\$	178,000.00	1	1.202	1.202		
Above Median	\$	178,000.00	o	0.767	0	1.20	
Total Anticipated Scho	ol-Age Child	ren Population G	eneration for Multi-F	amily (non age-res	tricted) Units		

Based on values supplied by the updated 2018 "Who Lives in New Jersey Housing? New Jersey Demographic Multipliers" published by The Rutgers University Center for Urban Policy Research in "Table II-A-2. Statewide New Jersey School-Age Children (SAC) (Continued) (Newer housing units built 2000-2016, from 2012-2016 ACS)"

## Net Cost-Revenue Impact - School District

With an equalized revenue generation of \$158,202 and a cost of \$135,576, there will be a net gain to the School District of \$22,626.

## Fiscal Impacts

Table 8 presents a summary of the total project generated revenues and associated costs for the proposed mixed-use development for municipal services and public school education. As shown, the costs to provide municipal services to the proposed development are outweighed by the anticipated revenue that will be generated in annual property taxes. Further, the proposed development will yield significant revenue to the public school district, while incurring no direct educational costs.

Table 8

Cost / Revenue Summary

Proposed 28,639 SF Mixed-Use Development

	COST	REVENUE	<b>NET IMPACT</b>
Bernardsville Municipal Services	\$ 62,524	\$ 64,154	\$ 1,630+
Somerset Hills Public Schools	\$135,576	\$158,202	<u>\$ 22,626</u> +
(Grades $K - 12$ )			
TOTAL	\$198,100	\$222,356	\$ 24,256 +

In addition to the above noted surplus *annual* revenues generated for municipal services (\$64,154+) and public school education (\$158,202+), based upon the apportionment of property taxes generated by the project (see Table 3), Bernardsville Borough would receive additional *annual* property tax revenue for local open space preservation (\$2,730), and for local library (\$4,368). Somerset County would receive \$44,771 in total property tax revenue from the proposed development to fund County services.

## Bernardsville RFP 2024 65 Morristown Rd. Bernardsville, NJ

REQUEST FOR PROPOSALS May 15, 2024

## RESPONDENT TEAM

## RESPONDENT/ DEVELOPER

KALIAN REAL ESTATE 2 HENNESSEY BOULEVARD ATLANTIC HIGHLANDS, NJ 07716

## **PRINCIPALS**

MAZIN (PATRICK) KALIAN, FOUNDER & PRESIDENT TYLER KALIAN, VP DEVELOPMENT & ACQUISITIONS

## ARCHITECT OF RECORD

Jarmel Kizel Architects and engineers, in. 42 Okner Parkway Livingston, nj 07039

## **ARCHITECTS**

AUSTIN SCHNEIDER KAROLINA PODKANOWICZ

## PLANNER

COFONE CONSULTING 125 HALF MILE ROAD RED BANK, NJ 07701

## PLANNER

CHRISTINE A. NAZARRO – COFONE AICP, PP

## LAND USE ATTORNEY

SILLA CUMMIS GROSS ONE RIVERFRONT PLAZA NEWARK, NJ 07102

## **ATTORNEY**

FRANK J. VITOLO



## **BAY VILLAGE**

22 Unit Multi-family Apartment and Office Building in Atlantic Highlands, NJ Completed 2017



29 WASHINGTON Carteret, NJ

64 Unit Apartment Building + 15,000 SF Retail Completed 2019



The Forum
24 Unit Multi-family Apartment
Red Bank, NJ Completed 2020



Atlantic Highlands, NJ
18 Apartments + 4,500 SF Retail
Completed 2023



Harbor House
Atlantic Highlands, NJ
10 Unit Multi-family Apartment Building
1,000 SF Retail Space
Completed 2019



Atlantic Highlands, NJ
10 Unit Apartment Building
Completed 2021 – Fully Occupied

## CURRENT PROJECTS



Globe Court - Red Bank
40 Unit Multi-family Apartment Building in
Red Bank, NJ
Approved Spring 2023
Anticipated Start of Fall 2023



21 Washington- Carteret NJ 153 Unit Apartment & 6,500SF Retail Construction Underway Anticipated Finish Summer 2025



The Bluffs
Point Pleasant, NJ
16 Town Homes
Completed 2021



Siddons Court Island Heights, NJ 12 Single Family Homes Construction Complete 2024

## CLIENT REFERENCES

## Investor -

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Peter McCarthy
Little Silver, NJ
pjmcap75@gmail.com
(732) 539-8020

## Investment Purchaser-

Laufer Capital
jlaufer@laufcap.com
Jim Laufer
(732) 977 - 7214

## Homeowner -

Dr. Donald MacDonald 25 Village Rd Sea Bright, NJ (732) 741-1902

## Investment Purchaser-

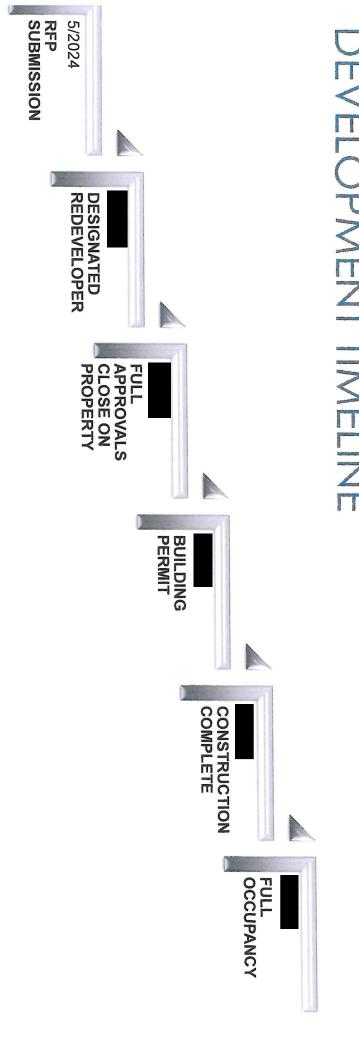
Suzanne Adams sfaloni@aol.com (973) 768-7180

## Lender-

Alex Fatenko
Tri-State Bank
SVP, Relationship Manager
afatenko@tscbank.com
c: 215-350-2450 | p: 609-512-2123

www.tscbank.com

# DEVELOPMENT TIMELINE



# SPONSOR INFORMATION

multifamily developments, and more recently, luxury rental apartments. NJ. Since 1986, Kalian has been building single family homes, luxury townhouses, Kalian Companies is a family-owned business based out of Monmouth County,

# 10,000+ Units Delivered Across 30+ Years

- Success across a diverse geography
- Founded in Red Bank, NJ with developments throughout the state
- Past developments in PA, TN, MS

## Current Developments Under Way

- Two Multifamily Rental Buildings in Atlantic Highlands, NJ
- 150 Unit Multifamily in Carteret



Tyler Kalian

VP Development
& Acquisitions



Mazin (Patrick) Kalian Founder & President



www.kalian.com

## MATTHEW B. JARMEL, AIA, MBA, NCARB President

Education Bachelor of Architecture, New Jersey Institute of Technology.

School of Architecture, Newark, New Jersey

Masters of Business Administration, Rutgers School of

Management, Newark, New Jersey

Registrations Registered Architect, NJ, AL, AZ, CO, CT, DE, FL, GA, IA, IL, IN, KS,

KY, MD, MA, MI, MN, MO, NH, NY, NC, NV, OH, OK, PA, RI, SC,

TN, TX, UT, VT, VA, WA, WI and Washington DC

Board-Certified, National Council of Architectural Registration Boards

(NCARB)

Affiliations American Institute of Architects (AIA)

National Council of Architectural Registration Boards (NCARB) New Jersey Institute of Technology, School of Architecture,

Dean's Executive Council, Liaison

New Jersey School of Architecture, Board of Visitors

Awards Who's Who under 40 years of age by NJBIZ News, March, 2003

AIA Samuel Adams Medal for excellence in the study of Architecture

NJ Top Architect, Real Estate New Jersey, 2009

Board Affiliations Metropolitan YMCA of the Oranges Board of Directors 2019 - on

Jewish Service for the Developmentally Disabled Trustee 2019 – on NJIT College of Architecture and Design Deans Council 1999 – on

NJIT Board of Visitors 1999- on

Years of Experience: 34

### Profile

Matthew Jarmel is a true practitioner of the architectural profession helping clients through traditional A/E design, with additional guidance in land entitlement strategies and financing options. He maintains 'big picture' project oversight, for projects in a multitude of industries, including: building repositioning and modernization, urban renewal, educational and child development centers, retail roll-out, fitness and wellness, corporate interiors, healthcare, and multifamily housing.

Matthew has qualified as an expert witness and testified before Municipal Planning and Zoning Boards, Redevelopment Authorities, and the Court System on land planning and development projects as well as an expert witness in Real Estate and construction related disputes. He has provided expert commentary and has written articles for the following publications: The New York Times, The Star Ledger, NJ Biz, Real Estate New Jersey, Real Estate Weekly, Brandweek, and The Trenton Times.

## IRWIN H. KIZEL, AIA, PP Principal

Education: Bachelor of Architecture, Pratt Institute, 1977

Graduate work in City and Regional Planning, Pratt Institute

Registrations: Registered Architect, NJ, 1981

Professional Planner, NJ, 1981

Registered Architect, CT

Affiliations: American Institute of Architects (AIA)

New Jersey Society of Architects

International Conference of Building Officials

Years of Experience: 47 Years with Jarmel Kizel: 33

## **Profile**

Irwin Kizel is responsible for overseeing design and production activity for Jarmel Kizel's architectural studio to ensure adherence to critical deadlines and specifications. Irwin is an expert in the field of architecture and has testified on architectural and planning issues before over thirty Municipal and City Planning Boards. Prior to joining Jarmel Kizel in 1991, Irwin spent over fourteen years supervising the design and management of commercial, residential, institutional, laboratory, educational, government and public projects for a central New Jersey architectural firm.

## RICHARD A. JARMEL, PE, CME Principal

Education: Master of Science, Civil Engineering – Construction Management,

New Jersey Institute of Technology, Newark, New Jersey (1989) Bachelor of Science, Civil Engineering, University of Nevada,

Las Vegas, Nevada (1986)

Registrations: Professional Engineer, NJ PE #37491 (1993), AL, CT, DE, FL, IL, IN, KS,

KY, MA, MD, MI, MN, MO, NC, NV, NY, OH, OK, PA, RI, SC, TN, TX,

UT, VA, VT, WA & WI

Certified Municipal Engineer, CME

Affiliations: National Council of Examiners for Engineering and Surveying (NCEES)

Years of Experience: 39 Years with Jarmel Kizel: 35

### **Profile**

Richard Jarmel manages the firm's Civil, Structural, Mechanical, Electrical, Plumbing and Fire Protection Engineering studio. His area of expertise has broadened over his more than three decades of working in the engineering field, having been ultimately responsible for the Civil, MEP and Structural Engineering portions of major projects from the design of new buildings, corporate interiors, government (DPMC) correctional facilities, warehousing, government retail to simultaneous roll-out projects across the United States.

Like other Principals at Jarmel Kizel, he remains deeply involved with his projects. His precision and eye-for-detail has saved clients time and money and has established Jarmel Kizel's long-term relationships with clients. Additionally, he supervises field activities for Jarmel Kizel, overseeing bidding and negotiations with construction contractors and performing contract administration services through field observation. Prior to joining Jarmel Kizel, Richard worked for a national engineering firm, where he supervised major transportation projects. He was also previously employed as Assistant Municipal Engineer for the Township of Scotch Plains, New Jersey. Mr. Jarmel previously served on the executive board of Temple Sholom of West Essex where he was Co-President and currently chairs the house/facility committee and sits on the finance committee.

## ANDRE BRZOZOWSKI, PE Associate, Director of Structural Engineering

Education Bachelor of Science, Civil Engineering, Lublin Polytechnic

Poland

Masters of Science, Civil Engineering, Lublin Polytechnic

Poland

Masters of Science, Civil Engineering, Columbia University

New York, NY

Registrations Professional Engineer, NJ, NY, POLAND

Years of Experience: 32 Years with Jarmel Kizel: 2

### **Profile**

Andre Brzozowski is a Professional Engineer with more than 30 years of experience in designing a wide variety of concrete, steel, and wood structures as well as renovating and rehabilitating existing buildings. Has designed many commercial and mixed-use mega projects worldwide, earning awards for such notable structures as the Cheju World Cup Stadium in Sogwipo, South Korea and the La Plata Stadium in Argentina. His extensive design experience also includes cultural and institutional projects, such as the Rose Center for Earth and Space at New York City's American Museum of Natural History, the National World War II Museum in New Orleans, LA, the Tammany Hall Union Square in New York, NY, many educational facilities, headquarters and office complexes, including the Brearley School in New York, NY, the World Headquarters of Jehovah's Witnesses in Warwick, NY and the Charter Communication Headquarters in Stamford, CT, and commercial waterfront developments such as the Gaoyang International Cruise Terminal Center and the Huishan North Bound office-led, mixed-use development along Pudong River in Shanghai, China. He is very experienced in coordinating his work with architectural, MEP and civil design teams.

## STEVEN VAZ, PE, LEED AP BD+C Associate / Director MEP Department

Education: New Jersey Institute of Technology, Newark, New Jersey (2013)

Bachelor of Science in Mechanical Engineering

Registrations: Professional Engineer, NJ PE #24GE05399600, CT, DE, FL, GA, MA,

MD, ME, MI, NC, NH, NY, OH, PA, RI, SC, VA, VT, WV & Washington

DC

Affiliations: National Council of Examiners for Engineering and Surveying (NCEES)

Years of Experience: 10 Years with Jarmel Kizel: 1

### Profile

Steven Vaz is a licensed Professional Engineer that serves as the Director of MEP Engineering at Jarmel Kizel Architects and Engineers, Inc. Additionally, he holds a LEED AP BD+C certification. Graduating with a Bachelor's of Science degree in Mechanical Engineering from New Jersey Institute of Technology in 2013, Steven has 10 years of applicable engineering experience with the A/E industry.

In his current position, Steven is leading a team of mechanical, plumbing and electrical engineers (both in person and remote) working on a multitude of project types. He is responsible for mentoring young engineers, reviewing and quality checking of construction documents, managing the team's workload and their respective deadlines, and completing engineering proposals. He serves as the primary Engineer of Record (EOR) for most of the MEP engineering projects throughout the country.

During his career, Steven has worked on a lot of different projects that provided work experience in industries such as restaurants, retail spaces, banks, mixed-use/multi-family, office spaces, warehouses, and alternate energy projects such as Combined Heating & Power (CHP) and natural gas generator systems. He has also completed numerous projects with LEED Certifications with some projects reaching Gold level. With extensive experience in AutoCAD, Revit (BIM Modeling), load calculation software, and energy modeling software, Steven and his team is capable of providing professional engineering services to any client.

## **GERARD GESARIO, PE**Associate, Director of Civil Engineering

Education: Bachelor of Science, Civil Engineering

New Jersey Institute of Technology

Registrations: Professional Engineer, NJ PE #GE038255

Areas of Expertise: Civil Engineering Design

Years of Experience: 36 Years with Jarmel Kizel: 10

### **Profile**

Gerard is a professional Civil Engineer at Jarmel Kizel. He brings over thirty-five years of professional practice in and over his career has been responsible for the engineering planning, design, project management, and construction of numerous large-scale governmental and private projects. His experience includes site design, storm water management, grading, soil erosion control, roadway design, construction cost estimating and land development permitting.

Gerard has extensive knowledge of current state and local regulations and has experience in obtaining approvals from numerous agencies within the State including Highlands, Coastal Area Facility Review Act (CAFRA), Pinelands, Drinking Water, Treatment Works Approvals (TWA), Flood Hazard Area, and Best Management Practices (BMP) for stormwater quantity, quality and groundwater recharge.

## KAROLINA PODANOWICZ, AIA Project Architect

Education: Bachelor of Architecture

New York Institute of Technology, New York, NY

Registrations Licensed Architect: NJ, NY

Years of Experience: 13 Years with Jarmel Kizel: 7

## **Profile**

As a licensed architect, Ms. Podanowicz has more than ten years of experience in the development of architectural design drawings and construction documents for corporate interiors, educational, financial institution buildings, and residential building types.

### Exhibit B-1

## Borough of Bernardsville PROPOSAL FORM B-1

## RESPONDENT INFORMATION/COVER LETTER

, (To be Prepared on Respondent's Letterhead)

Date: 5/115/24

Respondent: Kalian Management

Address: 2 Hennessey Blvd Atlantic Highlands NJ 07716

Telephone: (732)741-0054 Contact Person: Tyler Kalian

Type of Business Entity (Corporation, Partnership, Limit Liability Company, Joint Venture,

Other): LLC

In submitting this Proposal, the Respondent warrants and represents that:

- 1. A. The Respondent has reviewed and understands the requirements of the Request for Qualifications/Proposals dated March 18, 2024 (the "RFQ/P") issued by the Borough of Bernardsville (the "Borough"), in connection with the redevelopment of the Property, and, if selected, the Respondent will carry out all of the provisions of a redevelopment agreement specifying the terms of the redevelopment of the Property and the rights and responsibilities of the Borough and Respondent with respect to the project described therein (the "Redevelopment Agreement").
  - B. All information submitted in support of the Proposal is accurate and factual and all representations made regarding the Respondent's willingness and ability to carry out its obligations under the Redevelopment Agreement are true and correct.
  - C. The name and title of the individuals who served as the Respondent's key employees or representatives responsible for preparing the Proposal and who will be responding to questions on behalf of the Respondent are set forth below:
  - D. If Applicable: If the Proposal is being submitted by a joint venture or more than one firm and/or organization, list the joint venture members and designate a sole Contact Person for the joint venture below:
- 2. The Respondent shall not share or disclose any information contained in its Proposal with any third party without first obtaining the written consent and approval of the Borough.
- 3. Except to the extent expressly disclosed in the Proposal, there have been no material changes in the financial status of the Respondent since the date of the most recent financial data (including Forms 10-K, 10-Q and 8-K, if applicable) submitted as part of the response to this

RFQ/P and such financial information and data fairly and accurately reflects the financial position of the Respondent as of the date of submission of the Proposal.

- 4. The Proposal has been duly authorized by any corporate or other action of the Respondent, and is in all respect binding upon, the Respondent. The Proposal is authorized to be prepared and submitted under and in accordance with the provisions of the documents and/or agreements which govern the Respondent's business activities.
- 5. There is no action, suit or proceeding, at law or in equity, before or by any court or similar governmental body or arbitration/dispute resolution tribunal against the Respondent, its officers, directors and/or +1% shareholders, wherein any unfavorable decision, ruling or finding would adversely affect the ability of the Respondent to carry out the duties and obligations imposed upon it in the Redevelopment Agreement.
- The Respondent is duly organized and validly existing in good standing and is duly qualified to transact business in each and every jurisdiction where such qualification is required to enable the Respondent to perform its obligations under this RFQ/P and the Redevelopment Agreement. Execution of the Redevelopment Agreement and the performance of all obligations thereunder have been authorized by all required action of the Respondent, including any action required by any charter, by-law, and/or agreement, as the case may be and any applicable laws which regulate the conduct of the Respondent's affairs. Submittal of the Proposal and execution of a Redevelopment Agreement and the performance of all obligations set forth therein do not conflict with and do not constitute a breach of or event of default under any charter, by-laws and/or agreement as the case may be, of the Respondent or any agreement, indenture, mortgage, contract or instrument to which the Respondent is a party or by which it is bound so that, upon execution hereof and upon satisfaction of the conditions therein contained, a Redevelopment Agreement will constitute the valid, legally binding obligations of the Respondent, enforceable in accordance with its terms, except to the extent that enforcement thereof is limited by applicable bankruptcy, insolvency, reorganization, moratorium or other laws relating to or limiting creditors' rights generally and the application of the general principles of equity.
- 7. No corporation, partnership, individual or association, officer, director, employee, manager, parent, subsidiary, affiliate or principal shareholder of the Respondent has been charged or adjudicated to be in violation of any state or federal law, or charged with or convicted of bribery, fraud, collusion, or any violation of any state or federal anti-trust or similar statute within the preceding five (5) years, or previously adjudged in contempt of any court order enforcing such laws.
- 8. The Respondent is not currently in breach of or in default of any agreement, or any other applicable Federal, state and local laws and regulations that are necessary for or relate to the Respondent's ability to perform its obligations under the Redevelopment Agreement.
- 9. In the event that a joint venture or other relationship has been formed for purposes of submittal of a Proposal, the Contact Person identified in Paragraphs 1(D) above shall serve as the sole Contact Person for the joint venture or entity. As such, the Borough shall be obligated to provide information, Addenda to the RFQ/P and other documentation only to such Contact Person.

- The Respondent agrees to participate in good faith in the procurement process described in the RFQ/P (including, without limitation, the negotiations of the Redevelopment Agreement, if required and as permitted by applicable law) and to adhere to the Borough's procurement schedule. The Respondent acknowledges and agrees that submittal of its Proposal constitutes a waiver of any challenge or contest that the Respondent might have with respect to the Borough's action under and furtherance of the transactions contemplated by this RFQ/P and the Redevelopment Agreement.
- The Respondent acknowledges that all costs incurred by it in connection with the preparation and submission of the Proposal, and any negotiation which results therefrom (if required and as permitted by applicable law), shall be borne exclusively by the Respondent.
- The Respondent hereby declares that the only persons or firms participating as principals are named in the Proposal and that no person or firm other than those named in the Proposal will have any participation as principals in the Proposal or the Redevelopment Agreement, if executed. Additional persons or firms may subsequently be included as participating principals upon the provisions of written notice to the Borough.
- The Respondent acknowledges and agrees that the Borough may modify, amend, suspend, and/or terminate the procurement process (in its sole judgement). The Borough shall not have any liability to the Respondent for any costs incurred by the Respondent with respect to the procurement activities described in this RFQ/P.
- 14 The Respondent acknowledges and agrees that any contract executed with respect to the transactions contemplated by this RFQ/P (including specifically and without limitation, a Redevelopment Agreement) must comply with all applicable affirmative action and similar laws. Respondent hereby agrees to take such actions as are required in order to comply with such applicable law.
- 15. The Respondent has executed proposal Form A-5 and, as such, the Borough (and/or its designees and agents) shall have the right to contact any person and/or review any documentation (Subject to reasonable agreements as to maintenance of confidentiality) as may be required by the Borough to conduct any due diligence activities relating to the Respondent.
  - 16. The Respondent acknowledges receipt of all Addenda to this RFQ/P, if any.

[NAME OF RESPONDENT]

By: Name: Mazin Kalian Title: Presidant

## Exhibit B-2 Borough of Bernardsville PROPOSAL FORM B-2

## OWNERSHIP DISCLOSURE STATEMENT

In accordance with State law, corporate and partnership Respondents must submit a statement of names and addresses of all stockholders in the corporation or partnership owning 10% or more of its stock of any class, or of all individual partners in the partnership who own a 10% or greater interest, as the case may be. If one or more such stockholder or partner is itself a corporation or partnership, the names and addresses of stockholders holding 10% or more of that corporation's stock or of individual partners owning 10% or greater interest in that partnership, as the case may be, shall also be listed. The disclosure shall continue until names and addresses of every known corporate stockholder and individual partner, exceeding the 10% ownership criteria is listed. If the Respondent is neither a corporation or a partnership, it shall so attest in neither a corporation nor a partnership, it shall so attest in the space provided below:

NAME	ADDRESS				
Mazin Kalian	2 Henessey Blvd Atlantic Highlands NJ				
(Signature of President or Authorized Officer)	(Date)				
W ~ Control of Admonized Officer)	Mazin Kalian Managino				
(Name of Partnership or Corporation)	(Print Name and Title) paytur				
Kalian Managen ent	*				
(Address) ATTEST:					
Maue Lyden (Signature of Secretary of Assistant Secretary)	Marie Lyden, Notary (Print Name and Title)				
[Seal]					
NOTE: SUBMIT SIMILAR STATEMENT I VENTURE	FOR EACH MEMBER OF JOINT				
If the Respondent on the Agreement is neither a	corporation nor a partnership, please sign below.				
(Signature of Owner)	(Date)				
[Exhib	oit B-2]				

45337-46277-53312 W. 3

# Exhibit B-3 Borough of Bernardsville PROPOSAL FORM B-3

# PAY-TO-PLAY AFFIDAVIT

AFFIDAVII	OF COMPLIANCE WITH N.J.S.A. 19:44A-20.4, 20.5, ET SEQ.
State of	New Jersey
corporation of	Mazin Kalian (Name of Professional Business Entity if a par name of officer making affidavit) being duly sworn affirm that I am aware of the FN.J.S.A. 19:44A-20.4, 20.5, et seq.
nor I have m any time with political part	her declare that neither the professional business entity with which I am associated ade any contribution of money or anything of value including in kind contributions a hin the past year to any Borough of Bernardsville candidate for Commissioner of committee or their intermediaries including, but not limited to a Somerset Country committee that has, to our knowledge, contributed to any candidate for Bernardsville er.
made that it	her declare that I am aware that if it is determined that such contributions have been will be deemed as a material breach of any professional services agreement that I have with the Borough of Bernardsville and that I may be subject to penalties as may be law.
Signature of	Person Making Affidavit
	abscribed to before me this day of 5 /15 /2024
My Commis	sion expires on/
.e.	

# Exhibit B-4 Borough of Bernardsville PROPOSAL FORM B-4

#### NON-COLLUSION AFFIDAVIT

STATE OF _	New Jersey	
	î	:ss
COUNTY OF	Somerset	
Ι,	Mazin Kalian	, of Atlantic Highlands (name of
municipality New		is located) in the County of <u>Monmouth</u> , and the State of full age being duly sworn according to law on my oath, depose
and say that	_	dent (TITLE) of Kalian Management
(NAME OF	RESPONDENT),	the Respondent making the proposal to the Borough of
		in connection with the purchase and development by the
Respondent o	f certain real proper	ty in the Borough of Bernardsville, Somerset County, New Jersey Request for Qualifications/Proposals, dated March 18, 2024.
1.	Lexecuted the Pro	progal with full authority to do so

- The Respondent has not, directly or indirectly, entered into any agreement, participated in any collusion or otherwise taken any action in restraint of free competition in connection with the Proposal for the purchase and development of certain real property in the Borough of Bernardsville, Somerset County, New Jersey.
- 3. All statements contained in the Proposal and in this Affidavit are true and correct, and made with full knowledge that the Borough relies upon the truth of the statements contained in the Proposal and in the statements contained in this Affidavit in awarding a redevelopment agreement for the development of certain real property in the Borough of Bernardsville, Somerset County, New Jersey.
- 4. No person or selling agency has been employed or retained to solicit or secure agreement by the Borough to award a redevelopment agreement to the Respondent, upon an agreement or understanding, for a commission, percentage, brokerage or contingent fee, except bona fide employees or bona fide established commercial or selling agencies maintained by the Respondent for the purpose of securing business.

# Exhibit B-5 Borough of Bernardsville PROPOSAL FORM B-5

#### CONSENT TO INVESTIGATE

The Respondent (including its officers, directors, principals and partners) hereby gives its consent to the Borough of Bernardsville (the "Borough"), and its authorized representatives, to investigate and verify all information contained in the Proposal submitted herewith in response to the Request for Qualifications/Proposals (RFQ/P), dated March 18, 2024 issued by the Borough with respect to the Respondent's eventual purchase and development of certain real property in the Borough of Bernardsville, Somerset County, New Jersey, as defined in the RFQ/P. Such consent shall include information concerning the Respondent (including its principals and partners) maintained by state and/or federal regulatory agencies, including financial and law enforcement agencies. The Respondent (including its principals and partners) agrees that all financial institutions, law enforcement agencies, and regulatory agencies are authorized to release information verifying those representations and/or submissions made by the Respondent (including its principals and partners). The Respondent (including its principals and partners) further gives its consent to the Borough and/or its authorized representatives to inspect all premises or facilities owned and/or operated by the Respondent (including its principals and partners) and relevant records of the Respondent (including its principals and partners) in order to verify information contained in the Proposal.

The Respondent (including its principals and partners) agrees that a photocopy of this Consent to Investigation may be accepted by any agency or institution in lieu of the original.

#### (NAME OF RESPONDENT)

Mazin Kalian	•
(Name of Respondent)	
BY:(Signature of Duly Authorized Representative)	
Name: Mazin Kalian	
Title: President	
Subscribed and sworn to before me this 15 day	of <u>May</u> , 2024
Marie Lyden (Notary Public)	
My commission expires 11-17-2028	

Marie Lyden NOTARY PUBLIC STATE OF NEW JERSEY MY COMMISSION EXPIRES 11/17/2028

# Exhibit B-6 Borough of Bernardsville PROPOSAL FORM B-6

Prohibited Russia-Belarus Activities & Iran Investment Activities Certification

# Prohibited Russia-Belarus Activities & Iran Investment Activities Person or Entity Part 1: Certification COMPLETE PART I BY CHECKING ONE OF THE THREE BOXES BELOW Pursuant to law, any person or entity that is a successful bidder or proposer, or otherwise proposes to enter into or renew a contract, for goods or services must complete the certification below prior to contract award to attest, under penalty of perjury, that neither the person or entity, nor any parent entity, subsidiary, or affiliate, is identified on the Department of Treasury's Russia-Belarus list or Chapter 25 list as a person or entity engaging in prohibited activities in Russia, Belarus or Iran. Before a contract for goods or services can be amended or extended, a person or entity must certify that neither the person or entity, nor any parent entity, subsidiary, or affiliate, is identified on the Department of Treasury's Russia-Belarus list. Both lists are found on Treasury's website at the following web addresses: https://www.nj.gov/treasury/administration/pdf/RussiaBelarusEntityList.pdf www.state.nj.us/treasury/purchase/pdf/Chapter25List.pdf. As applicable to the type of contract, the above-referenced lists must be reviewed prior to completing the below certification. A person or entity unable to make the certification must provide a detailed, accurate, and precise description of the activities of the person or entity, or of a parent entity, subsidiary, or affiliate, engaging in prohibited activities in Russia or Belarus and/or investment activities in Iran. The person or entity must cease engaging in any prohibited activities and provide an updated certification before the contract can be entered into. If a vendor or contractor is found to be in violation of law, action may be taken as appropriate and as may be provided by law, rule, or contract, including but not limited to imposing sanctions, seeking compliance, recovering damages, declaring the party in default, and seeking debarment or suspension of the party. CONTRACT AWARDS AND RENEWALS I certify, pursuant to law, that neither the person or entity listed above, nor any parent

[Exhibit B-6]

on its behalf. (Skip Part 2 and sign and complete the Certification below.)

entity, subsidiary, or affiliate appears on the N.J. Department of Treasury's lists of entities engaged in prohibited activities in Russia or Belarus pursuant to P.L. 2022, c. 3 or in investment activities in Iran pursuant to P.L. 2012, c. 25 ("Chapter 25 List"). I further certify that I am the person listed above, or I am an officer or representative of the entity listed above and am authorized to make this certification

	CONTRACT AMENDMENTS AND EXTENSIONS
	I certify, pursuant to law, that neither the person or entity listed above, nor any parent entity, subsidiary, or affiliate is listed on the N.J. Department of the Treasury's lists of entities determined to be engaged in prohibited activities in Russia or Belarus pursuant to P.L. 2022, c. 3. I further certify that I am the person listed above, or am an officer or representative of the entity listed above and am authorized to make this certification on its behalf. (Skip Part 2 and sign and complete the Certification below.)
	IF UNABLE TO CERTIFY
	I am unable to certify as above because the person or entity and/or a parent entity subsidiary, or affiliate is listed on the Department's Russia-Belarus list and/or Chapter 25 Iran list. I will provide a detailed, accurate, and precise description of the activities as directed in Part 2 below, and sign and complete the Certification below. Failure to provide such will prevent the award of the contract to the person or entity, and appropriate penalties, fines, and/or sanctions will be assessed a provided by law.
	Part 2: Additional Information
USSIA OR BE ou must provid parent entity,	TIDE FURTHER INFORMATION RELATED TO PROHIBITED ACTIVITIES I LARUS AND/OR INVESTMENT ACTIVITIES IN IRAN.  e a detailed, accurate, and precise description of the activities of the person or entity, or a subsidiary, or affiliate, engaging in prohibited activities in Russia or Belarus and/oties in Iran in the space below and, if needed, on additional sheets provided by you.

# Part 3: Certification of True and Complete Information

I, being duly sworn upon my oath, hereby represent and state that the foregoing information and any attachments there, to the best of my knowledge, are true and complete. I attest that I am authorized to execute this certification on behalf of the above-referenced person or entity.

I acknowledge that the Borough of Bernardsville is relying on the information contained herein and hereby acknowledge that I am under a continuing obligation from the date of this certification through the completion of any contracts with the Borough of Bernardsville to notify the Borough of Bernardsville in writing of any changes to the answers of information contained herein.

I acknowledge that I am aware that it is a criminal offense to make a false statement or misrepresentation in this certification. If I do so, I recognize that I am subject to criminal prosecution under the law and that it will also constitute a material breach of my agreement(s) with the Borough of Bernardsville and that the Borough of Bernardsville at its option may declare any contract(s) resulting from this certification void and unenforceable.

Full Name (Print)	Mazin Kalian	Title	President	
Signature	w ~ ·		Date	5/15/24

# Exhibit B-7 Borough of Bernardsville PROPOSAL FORM B-7

# ACKNOWLEDGEMENT OF RECEIPT OF ADDENDA

The Undersigned Respondent hereby acknowledges receipt of the following Addenda:

Addendum Number	<u>Dated</u>	Ack	nowledge Receipt
			(Initial)
	The state of the s	(1)	
	3.		
		Managap di adalah sara	
Acknowledgment by Bidder:			
Name of Bidder:Kalia	n Management	и	
By Authorized Representative:	Mazin Kalian		
Signature:	(m ~ =		
Printed Name of Title:	President		
Date:5/15/24			