

**NOTICE OF REQUEST FOR PROPOSALS
FOR HEALTH INSURANCE BROKERAGE SERVICES
FOR THE MONROE TOWNSHIP BOARD OF EDUCATION
GLOUCESTER COUNTY**

**UNDER A FAIR AND OPEN PROCESS PURSUANT TO
N.J.S.A. 18A:18A-5 AND 19:44A-1 et. seq.**

Notice is hereby given that pursuant to the provisions of N. J. S. A 19:44A-20 and Chapter 271 of the laws of the State of New Jersey, the Monroe Township Board of Education, *temporarily located* at 1073 New Brooklyn Road, Williamstown, New Jersey 08094, is seeking RFP's (Request for Proposals) for **Health Insurance Brokerage Services**, to be provided to the Board of Education for a period of one (1) year, beginning **July 1, 2023**.

The Request for Proposals may be downloaded from the Monroe Township Board of Education's website at www.monroetwp.k12.nj.us or obtained at the Business Office, 1073 New Brooklyn Road, Williamstown, NJ 08094. All proposals submitted to the Board must be submitted pursuant to the Request for Proposals distributed by the Monroe Township Board of Education and in the format required therein and as set forth hereafter.

To be considered, a proposal for the above Request for Proposals for Health Insurance Brokerage Services must be received in the Monroe Township Board of Education Administrative Office on or before **2:00 pm, June 6, 2023**. The proposal must be mailed or hand-delivered. The envelope shall be marked with the words "PROPOSAL FOR HEALTH INSURANCE BROKERAGE SERVICES FOR THE MONROE TOWNSHIP BOARD OF EDUCATION and said envelope shall be addressed as follows:

Lisa Schulz, Business Administrator/Board Secretary
Monroe Township Board of Education
Temporarily located at:
1073 New Brooklyn Road
Williamstown, NJ 08094

In addition, the proposal must be sent electronically on or before 2:00pm on June 6, 2023 to Lisa Schulz, Business Administrator/Board Secretary at lschulz2@monroetwp.k12.nj.us

**Monroe Township Board of Education
RFP-Health Insurance Brokerage Services**

The **Monroe Township** Board of Education invites applications for interested insurance brokers to provide health insurance brokerage services as per the following:

**Request for Proposal
Health Insurance Brokerage Services**

District Information:

Number of Schools (1 High School, 1 Middle School, 4 Elementary Schools, 1 Central Administration Building)

Number of Students (5,743)

General fund Budget (\$130,643,771)

Number of Eligible Employees (688)

Number of Employees covered by Horizon Blue Cross and Blue Shield of New Jersey (623).

Purpose

The purpose of the Request for Proposal is to obtain competitive proposals for Health Insurance Brokerage Services. The Board intends to award a one-year contract pursuant to N.J.S.A.:40A:11-5(1)(a)(ii) with two one year options. Under Title 18A:18A-5, insurance services are not required to be bid or advertised and the Board is not required to award on the basis of lowest price and will award based on criteria as outlined in this request for proposals. The requests are being made to ensure the District receives the highest quality service at a fair and competitive price.

Term

The length of contract term will be from July 1, 2023 through June 30, 2024, with two one-year renewal options. The Board reserves the right to exercise renewal thereafter.

Compliance With Laws

The successful offer shall comply with all local, state and federal directives, orders and laws as applicable to this agreement.

Scope of Services: Health Insurance Brokerage Services

The Broker must:

1. Assist and manage the budget planning process, including examining and evaluating the impact of expected rate changes.
2. Provide the central administration with reasonable preliminary renewal figures during the budget process.
3. Responsible for negotiating annual renewal of existing coverage. This includes a review of the New Jersey State Health Benefits Plan as may be applicable from time to time.
4. Provide cost projections for the alternative design of current health benefit programs.
5. Prepare all necessary bid specifications, in the event the coverage is marketed, and evaluate all bids that are received.
6. Assist the District in evaluating and settling employee grievances related to health benefit issues.
7. Provide updates and regulatory bulletins related to potential legislative changes and regulations affecting the Board of Education.
8. Be available to attend Board of Education meetings, committee meetings, and budget and negotiation meetings, whenever necessary.
9. Assist the Business Administrator/Board Secretary with required employee presentations.
10. Broker must provide assistance with open enrollment, new hire meetings, and other employee education and support services, including employee wellness programs.
11. Broker is expected to provide web-based initiatives to supplement employee education and support services.
12. Provides management of COBRA continuation of health care benefit programs.

**Monroe Township Board of Education
RFP-Health Insurance Brokerage Services**

GENERAL PROVISIONS

1. Submission of Proposal

1.1 Submit one hard copy original to Lisa Schulz, Business Administrator/Board Secretary of the Monroe Township Board of Education *temporarily* located at 1073 New Brooklyn Road, Williamstown, NJ, 08094. The envelope shall be marked with the words “PROPOSAL FOR HEALTH INSURANCE BROKERAGE SERVICES FOR THE MONROE TOWNSHIP BOARD OF EDUCATION. The hard copy proposal must be **mailed or hand-delivered** no later than **2:00 pm on Tuesday, June 6, 2023**.

In addition, please submit one electronic copy to lschulz2@monroetwp.k12.nj.us no later than **2:00 pm on Tuesday, June 6, 2023**.

All questions concerning this notice should be addressed in writing to Lisa Schulz, Business Administrator/Board Secretary at lschulz2@monroetwp.k12.nj.us no later than **2:00 pm on Wednesday, May 24, 2023**.

- 1.2 The proposal must be concise and clear. Elaborate brochures or other presentations are not necessary or desired.
- 1.3 The Broker acknowledges that he/she has read this Request for Proposal, understands it, and agrees to be bound by its terms and conditions. Proposals must be submitted prior to the time and date specified, by mail or hand delivered to the Board of Education, and by electronic copy.
- 1.4 The Monroe Township Board of Education reserves the right to reject any or all proposals in whole.
- 1.5 Any departures from the specifications must be noted. Any conditions or terms must be written and included with the RFP.
- 1.6 Proposed Brokers shall be licensed or authorized to transact business in the State of New Jersey and have a favorable record with the Department of Insurance.
- 1.7 For all coverages, insurance company claims history shall be required quarterly, if available.
- 1.8 Insurance Plan Administration: For those coverages written, timeliness is essential and the selected broker shall agree to place coverage and issue binders prior to each policy expiration. Policies and/or endorsements are expected to be provided as soon as practicable

- after inception or renewal of the contract.
- 1.9 Access to Records: The selected broker must agree to provide full and free access to those records maintained with respect to the insured, as well as other books, records, and information reasonably related to the scope of services provided by the producer to the Board of Education.
- 1.10 Expenses: The selected broker will agree that he is responsible for his own expenses including travel and meals incurred in servicing the insured's account. Any extraordinary expenses that the producer expects to incur as the result of providing such special services to the insured should be delineated and agreed to in advance.
- 1.11 A proposal will not be a valid proposal and will not be read unless the following items are included in the proposal documents:

Acknowledgement of Addenda
Affirmative Action
Assurance of Compliance
Political Contribution Disclosure Form
Disclosure of Investment Activities in Iran
Disclosure of Prohibited Activities in Russia or Belarus
Non-Collusion Affidavit
Statement of Ownership Disclosure
Contractor/Vendor Questionnaire Certification
Business Registration Certificate
Mandatory Equal Opportunity Employment Language
Request for Reference

2. Late Proposals

- 2.1 Proposals received in the office of the Monroe Township Board of Education after the date and time prescribed shall not be opened and will be returned unopened to the Broker.

3. Period of Proposal Validity

- 3.1 All proposals shall remain firm for a period of ninety (90) days after the date specified for the receipt of proposals.

4. Basis of Award

- 4.1 The Business Administrator will review and evaluate all proposals submitted in response to this Request for Proposal. Under N.J.S.A. 18A:18A-5, Insurance services are not required to be bid or advertised and the board is not required to award on the basis of lowest quote and will award based on the criteria as outlined in this Request for Proposals. The request is being made to ensure the district receives the highest quality service at a fair and competitive price.

- 4.2 All Brokers are required to provide sufficient information in their proposals for evaluation. The Business Administrator shall conduct a preliminary evaluation of all proposals on the basis of the information provided with the proposal, the ability of the Broker to perform, on their past performance, the ability to meet the time requirement and understanding of the work to be performed.
- 4.3 The School Business Administrator may arrange for interviews with Brokers submitting proposals for the purpose of obtaining additional clarification, if necessary. Should proposals submitted require additional clarification and/or supplementary information, Brokers should be prepared to submit same in a timely manner.
- 4.4 Based upon this evaluation and review, the Business Administrator shall recommend a proposed contract with the highest qualified Company classified as “acceptable.”
- 4.5 Each submission shall be evaluated in accordance with the criteria set forth below:
- a. Insurance Carriers/Products from which you can obtain viable quotes
 - b. Services to be provided
 - c. Recommendations of references
 - d. Experience in assisting staff in resolving claims issues.
 - e. Familiarity with the School District
 - f. Specific Compensation Requirements

Final determination will be made by the Monroe Township Board of Education based upon evaluation of the above criteria and what is in the best interest of the District.

- 4.6 The Monroe Township Board of Education reserves the right to contact references provided with the proposal.
- 4.7 The Monroe Township Board of Education intends to award a professional services contract for the defined scope of work under the Fair and Open Process in accordance with N.J.S.A.19:44A-20.4 et seq.
- 4.8 If awarded a contract your company/firm shall be required to comply with the requirements of N.J.S.A.10:5-31 et seq. and N.J.A.C.17:27 et seq.

Monroe Township Board of Education
RFP-Health Insurance Brokerage Services

SUBMITTING BROKER RESPONSE FORM

You must address all of the following points in your proposal for Health Insurance Brokerage Services. If you feel that an individual item is not applicable to your proposal, you must clearly indicate this in the proposal.

1. Name of firm.
2. Location of firm main office and branches.
3. How many years the firm has been in business?
4. Total number of employees dedicated to servicing health insurance clients--total number of employees who hold a license with the required authorities.
5. Total number of New Jersey school board clients for health insurance. Indicate the top 5 largest school board clients in the State of New Jersey.
6. Include five current client references for health insurance brokerage services. References should be included on the Request for Reference form.
7. Describe the services your firm routinely performs for its clients.
 - A. Indicate your firm's involvement with the application process, written communications, employee meetings, etc.
8. Describe how your firm reviews all plan documents for compliance with applicable laws and contracted agreements.
9. Describe your knowledge and experience with negotiating health insurance renewals and administering Health Insurance Contracts.
10. Describe what service you can provide to our employees when a claim dispute arises for denial of a claim by the insurance carrier.
11. Describe any other benefits and/or products your firm could provide the district.
12. Please detail how your firm will be compensated for its services.
(Based on a fee for services contract for medical insurance. Prescription and dental may be on a commission basis.)
13. Please provide a brief resume of the employees of your firm who will provide insurance services to the Board and include the individual's level of experience in rendering such

services. Indicate the role each employee will assume in providing services to the Board.

MONROE TOWNSHIP BOARD OF EDUCATION



Request for Proposal RFP – BROKER OF RECORD SERVICES

PROPOSAL DOCUMENTS REQUIRED DOCUMENTATION

All documents in this section shall be completed, signed and submitted with the proposal package. Failure to submit the proposal documents and other documents so specified may be cause to reject the proposal for being non-responsive (N.J.S.A. 18A:18A-2(y)).



Lisa Schulz
School Business Administrator/Board Secretary

To be completed, signed and returned with the proposal

ACKNOWLEDGEMENT OF ADDENDA

RFP 23-01

Proposal Date: Tuesday, June 6, 2023

The Respondent acknowledges receipt of the hereinafter enumerated Addenda which has been issued during the period of bidding and agrees that said Addenda shall become a part of this contract. The respondent shall list below the numbers and issuing dates of the Addenda.

ADDENDA NO.

ISSUING DATES

_____	_____
_____	_____
_____	_____
_____	_____

☐ **NO ADDENDA RECEIVED**

Name of Company _____

Address _____ P.O. Box _____

City, State, Zip Code _____

Name of Authorized Representative _____

Signature _____ Title _____

To be completed, signed and returned with the proposal

AFFIRMATIVE ACTION QUESTIONNAIRE

RFP 23-01

Proposal Date: Tuesday, June 6, 2023

This form is to be completed and returned with the proposal. However, the Board will accept in lieu of this Questionnaire, an Affirmative Action Evidence Certificate of Employee Information Report.

1. Our company has a Federal Affirmative Action Plan approval. ☐ Yes ☐ No
If yes, please attach a copy of the plan to this questionnaire.

2. Our company has an N.J. State Certificate of Employee Information Report ☐ Yes ☐ No
If yes, please attach a copy of the certificate to this questionnaire.

3. If you answered “NO” to both questions No. 1 and 2, you must apply for an Affirmative Action Employee Information Report – Form AA302.

Please visit the New Jersey Department of Treasury website for the Division of Public Contracts Equal Employment Opportunity Compliance:

[NJ Department of the Treasury Contract Compliance \(state.nj.us\)](https://www.state.nj.us/treasury/contract-compliance/state.nj.us)

Click on “AA 302 Employee Information Report”

Complete and submit the form with the appropriate payment to:

Department of Treasury
Division of Purchase and Property
Contract Compliance and Audit Unit

The complete mailing address may be found on the Instructions page of Form AA-302.

All fees for this application are to be paid directly to the State of New Jersey. A copy of the Employee Information Report and a copy of the check shall be submitted to the Board of Education prior to the execution or award of the contract.

I certify that the above information is correct to the best of my knowledge.

Name: _____

Signature _____

Title _____ Date _____

Name of Company _____

City, State, Zip _____

To be completed, signed and returned with the proposal

ASSURANCE OF COMPLIANCE

Contact with Students

There may be times during the performance of this contract, where a contracted service provider may come in contact with students of the school district. The district fully understands its obligation to provide all students and staff members, a safe educational environment. To this end, the district is requiring all respondents to sign a statement of Assurance of Compliance, acknowledging the respondent's understanding of the below listed requirements and further acknowledging the respondent's assurance of compliance with those listed requirements.

Anti-Bullying Reporting--Requirement

When applicable, the contracted service provider shall comply with all applicable provisions of the New Jersey Anti-Bullying Bill of Rights Act—N.J.S.A. 18A:37-13.1 et seq., all applicable code and regulations, and the Anti-Bullying Policy of the Board of Education. In accordance with N.J.A.C. 6A:16-7.7 (c), a contracted service provider, who has witnessed, or has reliable information that a student has been subject to harassment, intimidation, or bullying shall immediately report the incident to any school administrator or safe schools resource officer, or the School Business Administrator/Board Secretary.

Criminal History Background Checks—N.J.S.A. 18A:6-7.1--Requirement

When applicable, the contracted service provider shall provide to the school district prior to commencement of contract, evidence or proof that each employee assigned to provide services and whose position involves **regular contact** with students, has had a criminal history background check, and furthermore, that said background check indicates that no criminal history record information exists on file for that worker. Failure to provide proof of criminal history background check for any employee coming in regular contact with students, prior to commencement of contact, may be cause for breach of contract. Reference NJDOE Broadcast 9/9/19

Pre-Employment Requirements

When applicable, all contracted service providers, whose employees have **regular contact with students**, shall comply with the Pre-Employment Requirements in accordance with New Jersey P.L. 2018 c.5, N.J.S.A. 18A:6-7.6 et seq. Contracted service providers are to review the following New Jersey Department of Education, Office of Student Protection—Pre-Employment Resource P.L. 2018 c.5 link below for guidance and compliance procedures.

<https://www.nj.gov/education/crimhist/preemployment/>

Name of Company _____

Name of Authorized Representative _____

Signature _____ Date _____

To be completed, signed and returned with the proposal

Chapter 271
POLITICAL CONTRIBUTION DISCLOSURE FORM
(Contracts that Exceed \$17,500.00)
Ref. N.J.S.A. 52:34-25

The undersigned, being authorized and knowledgeable of the circumstances, does hereby certify that _____ (Business Entity) has made the following **reportable** political contributions to any elected official, political candidate or any political committee as defined in N.J.S.A. 19:44-20.26 during the twelve (12) months preceding this award of contract:

Reportable Contributions

<u>Date of Contribution</u>	<u>Amount of Contribution</u>	<u>Name of Recipient Elected Official/ Committee/Candidate</u>	<u>Name of Contributor</u>

☐ **No Reportable Contributions** (Please check (✓) if applicable.)

I certify that _____ (Business Entity) made no reportable contributions to any elected official, political candidate or any political committee as defined in N.J.S.A. 19:44-20.26.

Certification

I certify, that the information provided above is in full compliance with Public Law 2005—Chapter 271.

Name of Authorized Agent _____

Signature _____ **Title** _____

Business Entity _____

To be completed and returned with the proposal

C. 271 POLITICAL CONTRIBUTION DISCLOSURE FORM
Contractor Instructions

Business entities (contractors) receiving contracts from a public agency that are NOT awarded pursuant to a “fair and open” process (defined at N.J.S.A. 19:44A-20.7) are subject to the provisions of P.L. 2005, c. 271, s.2 (N.J.S.A. 19:44A-20.26). This law provides that 10 days prior to the award of such a contract, the contractor shall disclose contributions to:

- any State, county, or municipal committee of a political party
- any legislative leadership committee*
- any continuing political committee (a.k.a., political action committee)
- any candidate committee of a candidate for, or holder of, an elective office:
 - of the public entity awarding the contract
 - of that county in which that public entity is located
 - of another public entity within that county
 - or of a legislative district in which that public entity is located or, when the public entity is a county, of any legislative district which includes all or part of the county

The disclosure must list reportable contributions to any of the committees that exceed \$300 per election cycle that were made during the 12 months prior to award of the contract. See N.J.S.A. 19:44A-8 and 19:44A-16 for more details on reportable contributions.

N.J.S.A. 19:44A-20.26 itemizes the parties from whom contributions must be disclosed when a business entity is not a natural person. This includes the following:

- individuals with an “interest” ownership or control of more than 10% of the profits or assets of a business entity or 10% of the stock in the case of a business entity that is a corporation for profit
- all principals, partners, officers, or directors of the business entity or their spouses
- any subsidiaries directly or indirectly controlled by the business entity
- IRS Code Section 527 New Jersey based organizations, directly or indirectly controlled by the business entity and filing as continuing political committees, (PACs).

When the business entity is a natural person, “a contribution by that person’s spouse or child, residing therewith, shall be deemed to be a contribution by the business entity.” [N.J.S.A. 19:44A-20.26(b)] The contributor must be listed on the disclosure.

Any business entity that fails to comply with the disclosure provisions shall be subject to a fine imposed by ELEC in an amount to be determined by the Commission which may be based upon the amount that the business entity failed to report.

The enclosed list of agencies is provided to assist the contractor in identifying those public agencies whose elected official and/or candidate campaign committees are affected by the disclosure requirement. It is the contractor’s responsibility to identify the specific committees to which contributions may have been made and need to be disclosed. The disclosed information may exceed the minimum requirement. The enclosed form, a content-consistent facsimile, or an electronic data file containing the required details (along with a signed cover sheet) may be used as the contractor’s submission and is disclosable to the public under the Open Public Records Act.

The contractor must also complete the attached Stockholder Disclosure Certification. This will assist the agency in meeting its obligations under the law. **NOTE: This section does not apply to Board of Education contracts.**

¹ N.J.S.A. 19:44A-3(s): “The term "legislative leadership committee" means a committee established, authorized to be established, or designated by the President of the Senate, the Minority Leader of the Senate, the Speaker of the General Assembly or the Minority Leader of the General Assembly pursuant to section 16 of P.L.1993, c.65 (C.19:44A-10.1) for the purpose of receiving contributions and making expenditures.”

List of Agencies with Elected Officials Required for Political Contribution Disclosure
N.J.S.A. 52:34-25

INSERT LIST OF AGENCIES
WITH ELECTED OFFICIALS

DISCLOSURE OF INVESTMENT ACTIVITIES IN IRAN FORM

BID SOLICITATION/PROPOSAL TITLE _____

VENDOR/BIDDER NAME _____

Pursuant to N.J.S.A. 52:32-57, et seq. (P.L. 2012, c.25 and P.L. 2021, c.4) any person or entity that submits a bid or proposal or otherwise proposes to enter into or renew a contract must certify that neither the person nor entity, nor any of its parents, subsidiaries, or affiliates, is identified on the New Jersey Department of the Treasury's Chapter 25 List as a person or entity engaged in investment activities in Iran. The Chapter 25 list is found on the Division's website at <https://www.state.nj.us/treasury/purchase/pdf/Chapter25List.pdf>. Vendors/Bidders must review this list prior to completing the below certification. If the Director of the Division of Purchase and Property finds a person or entity to be in violation of the law, s/he shall take action as may be appropriate and 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.

CHECK THE APPROPRIATE BOX

☐ I certify, pursuant to N.J.S.A. 52:32-57, et seq. (P.L. 2012, c.25 and P.L. 2021, c.4), that neither the Vendor/Bidder listed above nor any of its parents, subsidiaries, or affiliates is listed on the New Jersey Department of the Treasury's Chapter 25 List of entities determined to be engaged in prohibited activities in Iran.

OR

☐ I am unable to certify as above because the Vendor/Bidder and/or one or more of its parents, subsidiaries, or affiliates is listed on the New Jersey Department of the Treasury's Chapter 25 List. I will provide a detailed, accurate and precise description of the activities of the Vendor/Bidder, or one of its parents, subsidiaries or affiliates, has engaged in regarding investment activities in Iran by completing the information requested below.

Entity Engaged in Investment Activities _____

Relationship to Vendor/ Bidder _____

Description of Activities _____

Duration of Engagement _____

Anticipated Cessation Date _____

Attach Additional Sheets If Necessary

CERTIFICATION

I, the undersigned, certify that I am authorized to execute this certification on behalf of the Vendor/Bidder, that the foregoing information and any attachments hereto, to the best of my knowledge are true and complete. I acknowledge that the State of New Jersey is relying on the information contained herein, and that the Vendor/Bidder is under a continuing obligation from the date of this certification through the completion of any contract(s) with the State to notify the State in writing of any changes to the information contained herein; 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 will be subject to criminal prosecution under the law, and it will constitute a material breach of my agreement(s) with the State, permitting the State to declare any contract(s) resulting from this certification void and unenforceable.

Signature

Date

Print Name and Title

Version REV. 2.1 2021

**CERTIFICATION OF NON-INVOLVEMENT IN PROHIBITED ACTIVITIES
IN RUSSIA OR BELARUS PURSUANT TO P.L.2022, c.3**

CONTRACT / BID SOLICITATION TITLE _____

CONTRACT / BID SOLICITATION No. _____

CHECK THE APPROPRIATE BOX

I, the undersigned, am authorized by the person or entity seeking to enter into or renew the contract identified above, to certify that the Vendor/Bidder is not engaged in prohibited activities in Russia or Belarus as such term is defined in [P.L.2022, c.3](#),¹section 1.e, except as permitted by federal law.

☐ I understand that if this statement is willfully false, I may be subject to penalty, as set forth in P.L.2022, c.3, section 1.d.

OR

☐ I, the undersigned am unable to certify above because the person or entity seeking to enter into or renew the contract identified above, or one of its parents, subsidiaries, or affiliates may have engaged in prohibited activities in Russia or Belarus. A detailed, accurate and precise description of the activities is provided below.

Failure to provide such description will result in the Quote being rendered as non-responsive, and the Department/Division will not be permitted to contract with such person or entity, and if a Quote is accepted or contract is entered into without delivery of the certification, appropriate penalties, fines and/or sanctions will be assessed as provided by law.

Description of Prohibited Activity

Attach Additional Sheets If Necessary.

If you certify that the bidder is engaged in activities prohibited by P.L. 2022, c. 3, the bidder shall have 90 days to cease engaging in any prohibited activities and on or before the 90th day after this certification, shall provide an updated certification. If the bidder does not provide the updated certification or at that time cannot certify on behalf of the entity that it is not engaged in prohibited activities, the State shall not award the business entity any contracts, renew any contracts, and shall be required to terminate any contract(s) the business entity holds with the State that were issued on or after the effective date of P.L. 2022, c. 3.

Signature of Vendor's Authorized Representative

Date

Print Name and Title of Vendor's Authorized Representative

Vendor Name

Vendor Phone Number

Vendor Address (Street Address)

Vendor Fax Number

Vendor Address (City/State/Zip Code)

Vendor Email Address for Authorized Representative

¹ Engaged in prohibited activities in Russia or Belarus” means (1) companies in which the Government of Russia or Belarus has any direct equity share;

(2) having any business operations commencing after the effective date of this act that involve contracts with or the provision of goods or services to the Government of Russia or Belarus; (3) being headquartered in Russia or having its principal place of business in Russia or Belarus, or (4) supporting, assisting or facilitating the Government of Russia or Belarus in their campaigns to invade the sovereign country of Ukraine, either through in-kind support or for profit.

**This form is to be completed, certified and submitted prior to the award of contract.
To be completed, signed and returned with the proposal**

NON-COLLUSION AFFIDAVIT

Broker of Record Services

RFP No. 23-01

Proposal Date: Tuesday, June 6, 2023

I, _____ of the City of _____
in the County of _____ and the State of _____
of full age, being duly sworn according to law on my oath depose and say that:

I am _____ of the _____
Position in Company Name of Company

and the respondent making the Proposal for the above names contract, and that I executed the said Proposal with full authority so to do; that I have not, directly or indirectly, entered into any agreement, participated in any collusion, discussed any or all parts of this proposal with any potential bidders, or otherwise taken any action in restraint of free, competitive bidding in connection with the above named bid, and that all statements contained in said Proposal and this affidavit are true and correct, and made with full knowledge that the Board of Education relies upon the truth of the statements contained in said Proposal and in the statements contained in this affidavit in awarding the contract for the said proposal.

I further warrant that no person or selling agency has been employed or retained to solicit or secure such contract upon an agreement or understanding for a commission, percentage, brokerage or contingent fee, except bona fide employees of bona fide established commercial or selling agencies maintained by

(Print Name of Contractor/Vendor)

Subscribed and sworn to: _____
(SIGNATURE OF CONTRACTOR/VENDOR)

before me this _____ day of _____, _____.
Month Year

NOTARY PUBLIC SIGNATURE

Print Name of Notary Public

My commission expires _____, _____.
Month Day Year

SEAL

STAMP

To be completed, signed and returned with the proposal

STATEMENT OF OWNERSHIP DISCLOSURE

N.J.S.A. 52:25-24.2 (P.L. 1977, c.33, as amended by P.L. 2016, c.43)

This statement shall be completed, certified to, and included with all bid and proposal submissions. Failure to submit the required information is cause for automatic rejection of the bid or proposal.

Name of Organization: _____

Organization Address: _____

City, State, ZIP: _____

Part I Check the box that represents the type of business organization:

- ☐ Sole Proprietorship (skip Parts II and III, execute certification in Part IV)
☐ Non-Profit Corporation (skip Parts II and III, execute certification in Part IV)
☐ For-Profit Corporation (any type) ☐ Limited Liability Company (LLC)
☐ Partnership ☐ Limited Partnership ☐ Limited Liability Partnership (LLP)
☐ Other (be specific): _____

Part II Check the appropriate box

☐ The list below contains the names and addresses of all stockholders in the corporation who own 10 percent or more of its stock, of any class, or of all individual partners in the partnership who own a 10 percent or greater interest therein, or of all members in the limited liability company who own a 10 percent or greater interest therein, as the case may be. **(COMPLETE THE LIST BELOW IN THIS SECTION)**

OR

☐ No one stockholder in the corporation owns 10 percent or more of its stock, of any class, or no individual partner in the partnership owns a 10 percent or greater interest therein, or no member in the limited liability company owns a 10 percent or greater interest therein, as the case may be. **(SKIP TO PART IV)**

Name of Individual or Business Entity	Home Address (for Individuals) or Business Address

Part III DISCLOSURE OF 10% OR GREATER OWNERSHIP IN THE STOCKHOLDERS, PARTNERS OR LLC MEMBERS LISTED IN PART II

If a bidder has a direct or indirect parent entity which is publicly traded, and any person holds a 10 percent or greater beneficial interest in the publicly traded parent entity as of the last annual federal Security and Exchange Commission (SEC) or foreign equivalent filing, ownership disclosure can be met by providing links to the website(s) containing the last annual filing(s) with the federal Securities and Exchange Commission (or foreign equivalent) that contain the name and address of each person holding a 10% or greater beneficial interest in the publicly traded parent entity, along with the relevant page numbers of the filing(s) that contain the information on each such person. **Attach additional sheets if more space is needed.**

Website (URL) containing the last annual SEC (or foreign equivalent) filing	Page #'s

Please list the names and addresses of each stockholder, partner or member owning a 10 percent or greater interest in any corresponding corporation, partnership and/or limited liability company (LLC) listed in Part II **other than for any publicly traded parent entities referenced above.** The disclosure shall be continued until names and addresses of every non-corporate stockholder, and individual partner, and member exceeding the 10 percent ownership criteria established pursuant to N.J.S.A. 52:25-24.2 has been listed. **Attach additional sheets if more space is needed.**

Stockholder/Partner/Member and Corresponding Entity Listed in Part II	Home Address (for Individuals) or Business Address

Part IV Certification

I, being duly sworn upon my oath, hereby represent that the foregoing information and any attachments thereto to the best of my knowledge are true and complete. I acknowledge: that I am authorized to execute this certification on behalf of the bidder/proposer; that the **Monroe Township Board of Education** is relying on the information contained herein and that I am under a continuing obligation from the date of this certification through the completion of any contracts with the **Monroe Township Board of Education** to notify the **Monroe Township Board of Education** in writing of any changes to the information

contained herein; that I am aware that it is a criminal offense to make a false statement or misrepresentation in this certification, and if I do so, I am subject to criminal prosecution under the law and that it will constitute a material breach of my agreement(s) with the, permitting the **Board of Education** to declare any contract(s) resulting from this certification void and unenforceable.

Full Name (Print):		Title:	
Signature:		Date:	

This statement shall be completed, certified to, and included with all bid and proposal submissions. Failure to submit the required information is cause for automatic rejection of the bid or proposal.

To be completed, signed and returned with the proposal

**CONTRACTOR/VENDOR QUESTIONNAIRE CERTIFICATION
Broker of Record Services**

Name of Company _____
Address _____ PO Box _____
City, State, Zip _____
Business Phone Number (____) _____ Ext. _____
Emergency Phone Number (____) _____ FAX No. (____) _____
E-Mail _____ FEIN No. _____
DUNS Code (if applicable) _____ CAGE Code (if applicable) _____

References – Work previously done for School Systems in New Jersey

	<u>Name of District</u>	<u>Address</u>	<u>Contact Person/Title</u>	<u>Phone</u>
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____

Vendor Certifications

Direct/Indirect Interests

I declare and certify that no member of the Monroe Township Board of Education, nor any officer or employee or person whose salary is payable in whole or in part by said Board of Education or their immediate family members are directly or indirectly interested in this bid or in the supplies, materials, equipment, work or services to which it relates, or in any portion of profits thereof. If a situation so exists where a Board member, employee, officer of the board has an interest in the bid, etc., then please attach a letter of explanation to this document, duly signed by the president of the firm or company.

Gifts; Gratuities; Compensation

I declare and certify that no person from my firm, business, corporation, association or partnership offered or paid any fee, commission or compensation, or offered any gift, gratuity or other things of value to any school official, board member or employee of the Monroe Township Board of Education.

Vendor Certifications

I declare and certify that I fully understand N.J.A.C. 6A:23A-6.3(a) (1-4) concerning vendor contributions to school board members.

I certify that my company is not debarred from doing business with any public entity in New Jersey or the United States of America. N.J.S.A. 52:32-44.1 (a), N.J.A.C. 17:19-1.1 et seq.

I further certify that I understand that it is a crime in the second degree in New Jersey to knowingly make a material representation that is false in connection with the negotiation, award or performance of a government contract.

President or Authorized Agent

SIGNATURE

EXHIBIT A
MANDATORY EQUAL EMPLOYMENT OPPORTUNITY LANGUAGE
N.J.S.A. 10:5-31 et seq. (P.L. 1975, C. 127)
N.J.A.C. 17:27
GOODS, PROFESSIONAL SERVICE AND GENERAL SERVICE CONTRACTS

During the performance of this contract, the contractor agrees as follows:

The contractor or subcontractor, where applicable, will not discriminate against any employee or applicant for employment because of age, race, creed, color, national origin, ancestry, marital status, affectional or sexual orientation, gender identity or expression, disability, nationality or sex. Except with respect to affectional or sexual orientation and gender identity or expression, the contractor will ensure that equal employment opportunity is afforded to such applicants in recruitment and employment, and that employees are treated during employment, without regard to their age, race, creed, color, national origin, ancestry, marital status, affectional or sexual orientation, gender identity or expression, disability, nationality or sex. Such equal employment opportunity shall include, but not be limited to the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the Public Agency Compliance Officer setting forth provisions of this nondiscrimination clause.

The contractor or subcontractor, where applicable will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to age, race, creed, color, national origin, ancestry, marital status, affectional or sexual orientation, gender identity or expression, disability, nationality or sex.

The contractor or subcontractor will send to each labor union, with which it has a collective bargaining agreement, a notice, to be provided by the agency contracting officer, advising the labor union of the contractor's commitments under this chapter and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

The contractor or subcontractor, where applicable, agrees to comply with any regulations promulgated by the Treasurer pursuant to N.J.S.A. 10:5-31 et seq., as amended and supplemented from time to time and the Americans with Disabilities Act.

The contractor or subcontractor agrees to make good faith efforts to meet targeted county employment goals established in accordance with N.J.A.C. 17:27-5.2.

The contractor or subcontractor agrees to inform in writing its appropriate recruitment agencies including, but not limited to, employment agencies, placement bureaus, colleges, universities, and labor unions, that it does not discriminate on the basis of age, race, creed, color, national origin, ancestry, marital status, affectional or sexual orientation, gender identity or expression, disability, nationality or sex, and that it will discontinue the use of any recruitment agency which engages in direct or indirect discriminatory practices.

The contractor or subcontractor agrees to revise any of its testing procedures, if necessary, to assure that

all personnel testing conforms with the principles of job related testing, as established by the statutes and court decisions of the State of New Jersey and as established by applicable Federal law and applicable Federal court decisions.

In conforming with the targeted employment goals, the contractor or subcontractor agrees to review all procedures relating to transfer, upgrading, downgrading and layoff to ensure that all such actions are taken without regard to age, race, creed, color, national origin, ancestry, marital status, affectional or sexual orientation, gender identity or expression, disability, nationality or sex, consistent with the statutes and court decisions of the State of New Jersey, and applicable Federal law and applicable Federal court decisions.

The contractor shall submit to the public agency, after notification of award but prior to execution of a goods and services contract, one of the following three documents:

- Letter of Federal Affirmative Action Plan Approval;
- Certificate of Employee Information Report; or
- Employee Information Report Form AA-302 (electronically provided by the Division and distributed to the public agency through the Division's website at: http://www.state.nj.us/treasury/contract_compliance/).

The contractor and its subcontractors shall furnish such reports or other documents to the Division of Purchase & Property, CCAU, EEO Monitoring Program as may be requested by the office from time to time in order to carry out the purposes of these regulations, and public agencies shall furnish such information as may be requested by the Division of Purchase & Property, CCAU, EEO Monitoring Program for conducting a compliance investigation pursuant to N.J.A.C. 17:27-1.1 et seq.

(Revised: January, 2016)

AMERICANS WITH DISABILITIES ACT
Equal Opportunity for Individuals with Disability

The contractor must comply with all provisions of the Americans with Disabilities Act (ADA), P.L 101-336, in accordance with 42 U.S.C. S121 01 et seq.

The contractor and the Board of Education (hereafter "owner") do hereby agree that the provisions of Title 11 of the Americans With Disabilities Act of 1990 (the "Act") (42 U.S.C. S121 01 et seq.), which prohibits discrimination on the basis of disability by public entities in all services, programs, and activities provided or made available by public entities, and the rules and regulations promulgated pursuant there unto, are made a part of this contract. In providing any aid, benefit, or service on behalf of the owner pursuant to this contract, the contractor agrees that the performance shall be in strict compliance with the Act. In the event that the contractor, its agents, servants, employees, or subcontractors violate or are alleged to have violated the Act during the performance of this contract, the contractor shall defend the owner in any action or administrative proceeding commenced pursuant to this Act. The contractor shall indemnify, protect, and save harmless the owner, its agents, servants, and employees from and against any and all suits, claims, losses, demands, or damages, of whatever kind or nature arising out of or claimed to arise out of the alleged violation. The contractor shall, at its own expense, appear, defend, and pay any and all charges for legal services and any and all costs and other expenses arising from such action or administrative proceeding or incurred in connection therewith. In any and all complaints brought pursuant to the owner's grievance procedure, the contractor agrees to abide by any decision of the owner which is rendered pursuant to said grievance procedure. If any action or administrative proceeding results in an award of damages against the owner, or if the owner incurs any expense to cure a violation of the ADA which has been brought pursuant to its grievance procedure, the contractor shall satisfy and discharge the same at its own expense.

The owner shall, as soon as practicable after a claim has been made against it, give written notice thereof to the contractor along with full and complete particulars of the claim. If any action or administrative proceeding is brought against the owner or any of its agents, servants, and employees, the *owner shall* expeditiously forward or have forwarded to the contractor every demand, complaint, notice, summons, pleading, or other process received by the owner or its representatives.

It is expressly agreed and understood that any approval by the owner of the services provided by the contractor pursuant to this contract will not relieve the contractor of the obligation to comply with the Act and to defend, indemnify, protect, and save harmless the owner pursuant to this paragraph.

It is further agreed and understood that the owner assumes no obligation to indemnify or save harmless the contractor, its agents, servants, employees and subcontractors for any claim which may arise out of their performance of this Agreement. Furthermore, the contractor expressly understands and agrees that the provisions of this indemnification clause shall in no way limit the contractor's obligations assumed in this Agreement, nor shall they be construed to relieve the contractor from any liability, nor preclude the owner from taking any other actions available to it under any other provisions of the Agreement or otherwise at law.

**Monroe Township Board of Education
RFP – Health Insurance Brokerage Services**

REQUEST FOR REFERENCE FORM

1. School District _____
 Address _____
 Telephone _____
 Contact Individual _____
2. School District _____
 Address _____
 Telephone _____
 Contact Individual _____
3. School District _____
 Address _____
 Telephone _____
 Contact Individual _____
4. School District _____
 Address _____
 Telephone _____
 Contact Individual _____
5. School District _____
 Address _____
 Telephone _____
 Contact Individual _____

