

**Lumberton Township Board of Education**

**Request for Proposals**

**Professional Services and**

**Extraordinary Unspecifiable Service for**

**Board of Education Health Insurance Consultant**

**May 25, 2018 - 10:00 A.M.**

## **NOTICE OF SOLICITATION - *REQUESTS FOR PROPOSALS***

### **Professional Services and Extra-ordinary Unspecifiable Services**

Notice is hereby given that pursuant to the provisions of N.J.S.A. 19:44A-20, New Jersey Pay to Play, and other legislative enactments, more specifically Chapter 271 of the laws of the State of New Jersey, the Lumberton Township Board of Education, located at the **Administrator Building, 33 Municipal Drive, Lumberton, New Jersey 08048**, is seeking RFP's for professional services to be in compliance with the accountability regulations to be provided to the Board of Education as listed below for the period **July 1, 2018 to June 30, 2019, except as noted:**

#### **Extraordinary Unspecifiable Services Sought: Board of Education Health Insurance Consultant**

Requests for qualifications are on file at the Qualified Purchasing Agent's office at the **Ashbrook Elementary School – Administration Building, 33 Municipal Drive, Lumberton, NJ 08048** and may also be downloaded from the Board of Education's website at the following address: <http://www.lumberton.k12.nj.us>.

The Response to the RFP must be labelled with the **Board of Education Health Insurance Consultant** as well as the date of the RFP opening and time and the Board must receive all RFP's not later than **May 25, 2018 by 10:00 a.m.** at the **Board of Education** office located at the **Ashbrook Elementary School – Administration Building, 33 Municipal Drive, Lumberton, NJ 08048**. All questions concerning this notice should be addressed to the **School Business Administrator/Board Secretary, Mr. Thomas J. Fanuka**, at **609-267-1406, ext. 6615**, or preferably via email at [tfanuka@lumberton.k12.nj.us](mailto:tfanuka@lumberton.k12.nj.us).

All statements of qualifications for professional service contracts and extraordinary unspecifiable services contracts shall include at a minimum the following information.

1. All required forms as per Appendix A
2. Names of individuals who will perform required tasks as well as the listing of their licenses.
  - A. Identify the person who will be primarily responsible for the services required by the Board of Education and provide a description of the experience of the primary person with projects and issues similar to those more specifically set forth in this proposal and on behalf of the Lumberton Township Board of Education.
  - B. Identify persons who will serve as back up to the primary person including resumes of all parties. Describe ability to provide services in a timely fashion including a description of your staffing and a description of your familiarity with the services required by the Lumberton Township Board of Education including all cost of services provided. staffing and a description of your familiarity with the services required by the Lumberton Township Board of Education including all cost of services provided.

### **INTRODUCTION**

The School Business Administrator will represent the Board in the administration of this contract.

The Lumberton Township Board of Education (hereinafter "Board") is seeking proposals from qualified parties (hereinafter "Respondent") for the review/audit of Special Education practices, in the Lumberton Township School District (hereinafter "District").

Qualifications will be evaluated on the basis of anticipated service, resources, past engagements and documented performance. Successful respondents will demonstrate the ability to fulfill the requirements of the contract, meet specifications, attain the objectives of the District and, all other factors being equal, provide the best value in terms of meeting the District's mission and

cost objectives. Aside from those specific items mentioned in this RFP, the District will not dictate the structure of any plan nor any specific methodology. These will be left to the discretion of the respondent.

The term “Bidder”, “submitter”, “respondent”, “vendor” and “contractor” may be intermingled throughout this specification. They are one and the same.

### GENERAL RESPONDENT RESPONSIBILITIES

- 1) Respondent must meet all standards of local, State and federal requirements.
- 2) Bidder must provide evidence of knowledge in the area
- 3) An evaluation of each acceptable proposal will be completed by the District.
- 4) Solicitations shall be in conformance with the applicable requirements of the New Jersey Public School Contracts Law (N.J.S.A. 18A:18A-1 et. seq.).
- 5) The Respondent must provide a NJ Business Registration.

### GENERAL PROVISIONS

#### PROPOSAL FORMAT

Because of the unique nature of the services being requested, the respondent is asked to prepare the proposal and provide at a minimum the following sections. The respondent is encouraged to provide additional information it believes will help the Board understand the respondent’s capabilities to provide the review/audit.

1. Background information of principal person conducting the services
2. Proposal Cost Sheet
3. All required documents
  - a. Stockholder Disclosure Form
  - b. Affirmative Action Certificate
  - c. Non-collusion certificate
  - d. NJ Business Registration Certificate
  - e. IRS W9 Form
  - f. Iran Investments Disclosure Form
4. Other information as deemed necessary by respondent

#### AWARDING OF CONTRACT

All proposals will remain firm for a period extending 90 days from the indicated submission date for proposals.

Lumberton Township Board of Education reserves the right to reject any and all proposals submitted. The contract will be awarded to the respondent whose proposal is deemed in the best interest of the Lumberton Township Board of Education.

#### SPECIFIC REQUIREMENTS

All services are detailed below:

## **Board of Education Health Insurance Consultant**

### **Scope of Services**

The Board of Education desires to appoint a firm to provide health insurance brokerage services to the board. Applicants should demonstrate knowledge and experience with the respect to all aspects of health insurance brokerage services required by a school board. Any experience or knowledge of matters that directly affect the Board of Education should be addressed.

### **Minimum Qualifications**

1. Must be licensed to provide health insurance brokerage services in the State of New Jersey.
2. The professional will be expected to be available to provide advice to the Board of Education during non-business hours.
3. Must have been in business a minimum of ten (10) years.
4. Must maintain a principal office location in close proximity to the Board of Education so as to be able to respond to emergent matters promptly.
5. Must be currently servicing a minimum of 2,500 public school clients.
6. Must have an insurance professional with at least twenty (20) years of school board collective bargaining experience.
7. Must list a minimum of five (5) current school board clients.

Term of Service: **July 1, 2018 through June 30, 2019**

Any questions regarding this Request for Proposals should be directed to **Mr. Thomas J. Fanuka, School Business Administrator/Board Secretary, of the Lumberton Township Board of Education.**

All submissions must be labelled with the services as well as the date of the RFP opening and time and must be received at the **School District's Administrative Office by May 25, 2018 by 10:00 a.m.** at which time they will be publicly opened.

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# FORMS

**LUMBERTON TOWNSHIP SCHOOLS**

DISCLOSURE STATEMENT

ALL CORPORATE OR PARTNERSHIP BIDDERS SHALL COMPLETE THIS FORM WHICH IS IN ACCORDANCE WITH P.L. 1977 CH. 33 (N.J.S.A. 52:25-24.2)

List of shareholders or partners with 10% or more of the stock or interest in said corporation or partnership (all corporate partners or shareholders owning 10% or more of the stock must disclose their shareholders as above provided).

<u>Shareholder or Partner</u>	<u>% Interest</u>	<u>Address</u>
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( ) No stockholder or partner of the corporation or partnership holds 10% or more ownership.

( ) Bidder is a corporation: EIN: \_\_\_\_\_

( ) Bidder is a partnership: EIN: \_\_\_\_\_

( ) Bidder is a sole proprietorship: EIN/SSN: \_\_\_\_\_

I hereby certify that the information given above is true and correct as of \_\_\_\_\_.  
(Date of Bid)

\_\_\_\_\_  
Title & Signature of Authorized Representative

If there are any questions concerning this form or its completion, refer to Statute (PL 1977, CH. 33) N.J.S.A. 52:25-24.2

**This document must be provided.**

**LUMBERTON TOWNSHIP SCHOOLS**

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

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

- (a) 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, sex, affectional or sexual orientation. The contractor will take affirmative action to ensure that such applicants are recruited and employed, and that employees are treated during employment, without regard to their age, race, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation. Such action 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;
- (b) 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, sex, affectional or sexual orientation;
- (c) The contractor or subcontractor, where applicable, will send to each labor union or representative or workers with which it has a collective bargaining agreement or other contract or understanding, a notice to be provided by the agency contracting officer advising the labor union or workers' representative of the contractor's commitments under this act and shall post copies of the notice in conspicuous places available to employees and applicants for employment.
- (d) The contractor or subcontractor, where applicable, agrees to comply with the regulations promulgated by the Treasurer pursuant to P.L. 1975, c. 127, as amended and supplemented from time to time and the Americans with Disabilities Act.
- (e) The contractor or subcontractor agrees to attempt in good faith to employ minority and female workers consistent with the applicable county employment goals prescribed by N.J.A.C. 17:27-5.2 promulgated by the Treasurer pursuant to P.L. 1975, c. 127, as amended and supplemented from time to time or in accordance with a binding determination of the applicable county employment goals determined by the Affirmative Action Office pursuant to N.J.A.C. 17:27-5.2 promulgated by the Treasurer pursuant to P.L. 1975, c. 127, as amended and supplemented from time to time.
- (f) The contractor or subcontractor agrees to inform in writing appropriate recruitment agencies in the area, including employment agencies, placement bureaus, colleges, universities, labor unions, that it does not discriminate on the basis of age, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation, and that it will discontinue the use of any recruitment agency which engages in direct or indirect discriminatory practices.
- (g) 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.

**This document must be provided.**

**AFFIRMATIVE ACTION (Cont.)**

- (h) 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, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation, and conform with the applicable employment goals, consistent with the statutes and court decisions of the State of New Jersey, and applicable Federal law and applicable Federal court decisions.
- (i) The contractor and its subcontractors shall furnish such reports or other documents to the Affirmative Action Office 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 Affirmative Action Office for conducting a compliance investigation pursuant to Subchapter 10 of the Administrative Code (NJAC 17:27).

All successful vendors shall submit within 7 days of the notice of intent to award the contract or the signing of the contract one of the following:

1. Evidence of a federally approved Affirmative Action Plan;
2. A certificate of Employee Information Report Approval; or
3. A completed Employee Information Report (Form AA302). This form is available upon request from the Business Office of the Board of Education.



**This document must be provided.**

## LUMBERTON TOWNSHIP SCHOOLS

### AFFIRMATIVE ACTION QUESTIONNAIRE

1. Our company has a federal Affirmative Action Plan approval.

YES       NO

A. If yes, a photostatic copy of said approval shall be submitted to the Board of Education within seven (7) working days of the notice of intent to award the contract or the signing of the contract.

2. Our company has a New Jersey State Certificate of Approval.

YES       NO

A. If yes, a copy of the New Jersey State Certificate shall be submitted to the Board of Education within seven (7) working days of the notice of intent to award the contract or the signing of the contract.

3. If you answered NO to both questions above, an Affirmative Action Employee Information Report (AA302) will be mailed to you. Complete the form and forward it to the Affirmative Action Office Department of Treasury, CN 209, Trenton, NJ 08625. A copy shall be submitted to the Board of Education within seven (7) days of the notice of the intent to award the contract or the signing of the contract.

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

NAME \_\_\_\_\_

SIGNATURE \_\_\_\_\_

TITLE \_\_\_\_\_

DATE \_\_\_\_\_

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**This document must be provided.**

**LUMBERTON TOWNSHIP SCHOOLS**

**FORM OF NON-COLLUSION AFFIDAVIT**

STATE OF NEW JERSEY, COUNTY OF \_\_\_\_\_

I, \_\_\_\_\_ of \_\_\_\_\_

of \_\_\_\_\_, in the County of \_\_\_\_\_,  
(city, town, borough)

State of \_\_\_\_\_, of full age, being duly sworn

according to law on my oath depose and say that:

I \_\_\_\_\_ am \_\_\_\_\_ of \_\_\_\_\_ the \_\_\_\_\_ firm  
of \_\_\_\_\_

the bidder making the Proposal for the Service Contracting of Custodial Services Contracts, and that I executed the paid Proposal with full authority to do so, that said bidder has not, directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free, competitive bidding in connection with the above bid and that all statements contained in said Proposal and in this affidavit are true and correct, and made with full knowledge that the State of New Jersey 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 project.

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 or bona fide established commercial or selling agencies maintained by

\_\_\_\_\_  
(Name of Contractor)

(N.J.S.A. 52:34-15)

\_\_\_\_\_  
Signature

Subscribed and sworn before me this  
\_\_\_\_\_ day of \_\_\_\_\_, 19\_\_\_\_

\_\_\_\_\_  
(Seal Notary Public of New Jersey)

My commission expires \_\_\_\_\_, 19\_\_\_\_

**This document must be provided.**

## **LUMBERTON TOWNSHIP SCHOOLS**

### **DISCLOSURE OF INVESTMENTS IN IRAN**

In accordance with Public Law 2012, c. 25, any person or entity that submits a bid or proposal or otherwise proposes to enter into or renew a contract must complete the certification below to attest, under penalty of perjury, that neither the person or entity, nor any of its parents, subsidiaries, or affiliates, is identified on the Department of Treasury's Chapter 25 list as a person or entity engaging in investment activities in Iran. The Chapter 25 list is found on the Division's website at <http://www.state.nj.us/treasury/purchase/pdf/Chapter25List.pdf>. Bidders must review this list prior to completing the below certification. Failure to complete the certification will render a bidder's proposal non-responsive. If the Director finds a person or entity to be in violation of law, s/he shall take action as may be appropriate and provided by law, rule of 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.

PLEASE CHECK EITHER SPACE:

- I certify, pursuant to Public Law 2012, c. 25, that neither the person/entity listed below nor any of the entity's parents, subsidiaries, or affiliates is listed on the NJ Department of the Treasury's list of entities determined to be engaged in prohibited activities in Iran pursuant to P.L. 2012, C. 25 ("Chapter 25 List"). I further certify that I am the person listed below, or I am an officer or representative of the entity listed below and am authorized to make this certification on its behalf. I will skip Part 2 and sign and complete the Certification.

OR

- I am unable to certify as above because I or the bidding entity and /or one or more of its parents, subsidiaries, or affiliates is listed on the Department's Chapter 25 list. I will provide a detailed, accurate and precise description of the activities in Part 2 below and sign and complete the Certification below. Failure to provide such will result in the proposal being rendered as non-responsive and appropriate penalties, fines and/or sanctions, fines and /or sanctions will be assessed as provided by law.

**LUMBERTON TOWNSHIP SCHOOLS**

**DISCLOSURE OF INVESTMENTS IN IRAN**

PART 2

PLEASE PROVIDE FURTHER INFORMATION RELATED TO INVESTMENT ACTIVITIES IN IRAN.

You must provide a detailed accurate and precise description of the activities of the bidding person/entity, or one of its parents, subsidiaries or affiliates, engaging in the investment activities in Iran outlined above by completing the boxes below.

PROVIDE INFORMATION RELATIVE TO THE ABOVE QUESTIONS. PLEASE PROVIDE THOROUGH ANSWERS TO EACH QUESTIONS. IF YOU NEED TO MAKE ADDITIONAL ENTRIES, USE ADDITIONAL PAGES.

\_\_\_\_\_  
(Name of Contractor)

\_\_\_\_\_  
Signature

Subscribed and sworn before me this

\_\_\_\_\_ day of \_\_\_\_\_, 19\_\_\_\_

\_\_\_\_\_  
(Seal Notary Public of New Jersey)

My commission expires \_\_\_\_\_, 19\_\_\_\_