

**MONTCLAIR BOARD OF EDUCATION**

**REQUEST FOR PROPOSAL**

**FOR:**

**Insurance Brokerage Services Property & Casualty and  
Workers Compensation**

Emidio D'Andrea  
Business Administrator/  
Board Secretary

**MONTCLAIR BOARD OF EDUCATION**

**REQUEST FOR PROPOSAL**

**FOR:**

**Insurance Brokerage Services Property & Casualty and Workers Compensation**

Proposals for the furnishing of Insurance Brokerage Services will be received by the MONTCLAIR BOARD OF EDUCATION, until 11:00 a.m., prevailing time on June 12, 2018 at the Montclair Administration Building, 22 Valley Road, Montclair, NJ 07042.

Emidio D'Andrea, School Business Administrator at the above address, must receive proposals prior to this time. Envelopes containing proposals should be clearly marked as to the contents in the following manner:

**“Proposals to Furnish Insurance Brokerage Services Property & Casualty and Workers Compensation”**

Emidio D'Andrea  
Business Administrator/  
Board Secretary

**MONTCLAIR BOARD OF EDUCATION**  
**22 Valley Road**  
**Montclair, NJ 07042**

**INSTRUCTIONS FOR PROPOSAL**

**1.0 Purpose**

The purpose of the Request for Proposal is to obtain competitive proposals for Insurance Broker Services coverage as an Extraordinary Unspecifiable Service. The Board intends to award a three-year contract pursuant to N.J.S.A. 18A:18A-42 with the option of one two-year or two one-year renewals for a total of five (5) years.

- 1.1 All Brokers shall be currently licensed and authorized by the State of New Jersey Department of Insurance to do business in the State of New Jersey.
- 1.2 The Board of Education will exercise its right to review, revise, and approve written and other communication material.

**2. Term**

The Broker for Property and Casualty (consisting of Property Insurance, General Liability, Auto Liability & Physical Damage, Workers' Compensation & Employers Liability, and Professional Liability insurances) will be subject to a three-year contract. The Board reserves the right to exercise renewal thereafter.

The length of term for the Property and Casualty Insurance services is as follows:

July 1, 2018 to June 30, 2021 with a flat commission fee to be determined by the district and insurance company.

**3. Compliance With Laws**

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

## GENERAL PROVISIONS

### 1. Submission of Proposal

- 1.1 One (1) original and two (2) copies of each of the Insurance Brokerage Service proposals are due at the office of Emidio D'Andrea, School Business Administrator, Montclair Board of Education, 22 Valley Road, Montclair, NJ 07042.
- 1.2 The proposal must be concise and clear. Elaborate brochures or other presentations are not 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 Montclair Board of Education, Administration Building, 22 Valley Road, Montclair, NJ 07042. **No facsimile or e-mail proposals will be accepted.**
- 1.4 The Montclair 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 loss summaries shall be required quarterly.
- 1.8 Premium Payment: Consideration will be given to the mode of payment required that may best suit the cash flow of the insured.
- 1.9 Insurance Plan Administration: For all coverage written, timeliness is essential and the selected broker shall agree to place coverage and issue binders prior to the expiration of each policy. Policies and/or endorsements are expected to be provided as soon as practicable after inception or renewal of the contract.
- 1.10 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 Montclair Board of Education

- 1.11 Expenses: The selected broker will agree that they are responsible for their 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.
- 1.12 Schedule of Insurance: On an annual basis, the selected producer will provide the Board of Education with a schedule detailing the coverages placed through the firm. Allocation of premium should be provided as required by the School System. Additional schedules must also be provided as needed by the School System.
- 1.13 A proposal will not be a valid proposal and will not be read unless the following items are included in the proposal documents:
  - 1.13.1 Statement of Ownership (page # 10)
  - 1.13.2 Non Collusion Affidavit (page # 11)
  - 1.13.3 Affirmative Action Supplement to Contract (page # 12)
  - 1.13.4 Request for Reference: Property & Casualty Insurance (page # 13)
  - 1.13.5 Business Registration Certificate
  - 1.13.6 Political Contribution Disclosure form Chapter 271

## **2 Late Proposals**

- 2.1 Proposals received in the office of the Montclair 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 sixty (60) days after the date specified for the receipt of proposals.
- 3.2 All proposals must stipulate that commissions are guaranteed for sixty (60) days following receipt.

## **4 Basis of Award**

- 4.1 The Business Administrator will review and evaluate all proposals submitted in response to this Request for Proposal.
- 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, if required, for the purpose of obtaining additional clarification. Should proposals submitted require additional clarification and/or supplementary information, Brokers should be prepared to submit same in a timely manner.
- 4.4 Proposals, which, after discussion and submission of additional clarification and/or supplementary information, are determined to meet the specifications, will be classified as “acceptable.” Proposals found not to meet the specifications will be classified, as “unacceptable” and no further discussion concerning same will be conducted.
- 4.5 Based upon this evaluation and review, the Business Administrator shall recommend a proposed contract with the highest qualified Company classified as “acceptable.”
- 4.6 Brokers are advised that in the event of receipt of adequate number of proposals, which, in the opinion of the Business Administrator require no clarification and/or supplementary information, such proposals may be evaluated without any further discussion. Therefore, proposals should be submitted initially on the most complete and favorable terms from an underwriting standpoint, which are capable of submitting to the Board.
- 4.7 Each submission shall be evaluated in accordance with the criteria set forth below:
  - a. Flat commission fee.
  - b. Services to be provided.
  - c. Recommendations of references.
- 4.8 The Montclair Board of Education reserves the right to make on-sight visitations to access the capabilities of individual Brokers and to contact references provided with the proposal.

## **SUBMITTING BROKER RESPONSE FORM**

You must address all of the following points in your proposal for property & casualty and worker's compensation 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 has the firm been in business?
  
4. Total number of employees dedicated to servicing property and casualty insurance clients--total number of service employees who hold a license in the property and casualty authorities.
  
5. Total number of clients for property/casualty insurance. Indicate the top 5 largest clients and all public sector and non-profit clients in the State of New Jersey.
  
6. Include five current client references for the brokerage services that you are proposing on. References should be included on the Request for Reference form.
  
7. Describe the proposed management of the account as specifically as possible. Your response must indicate that overall coordination of the account will be placed with an identified account manager. This individual's functions should be clearly described and any secondary personnel should also be identified and their roles defined. The credentials and experience of all members of your proposed account management team should be detailed. Also, the number of total clients serviced by the proposed management team must be included.

8. Risk Information Systems: Accurate loss data is necessary to plan for renewals, maximize reimbursement and assess the feasibility of alternative risk financing options. Specify your firm's resources for managing information in the following areas: incident/claims loss reporting; loss control data analysis/trending systems; and loss forecasting models/actuarial services. Address your firm's ability and willingness to provide information that would facilitate measurement of the School System's internal Risk Management and Risk Financing effectiveness.
9. Risk Management / Loss Control Services: The proposal requires that the responding producer identify and define the available services they have available to respond to the risk management needs of a school system. The following areas should be considered in preparing a response: Risk Management Education; Professional and General Liability Exposure Reviews; Workers' Compensation – Employee Exposures; and Property Insurance and Property Conservation Exposures. The response should incorporate the types of inspections required, instructional services available, and any other Risk Management concerns.
10. How will the designated account team work with the district administrators and staff in implementing any new and/or existing programs?
11. 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.
12. Does your firm provide a toll free number and Internet access? Will that access be available to administrators and employees?
13. Describe how your firm would develop specifications for competitive quotes and provide this information to the Business Administrator and/or Board?
14. Describe what other benefits and/or products your firm could provide the district.
15. Describe how your firm reviews all plan documents for compliance with applicable laws and contracted agreements.
16. Describe how your firm would review coverages for the district and evaluate the effectiveness.



## ADMINISTRATIVE INFORMATION REQUIREMENTS

The Respondent shall, as part of its Proposal Statement, provide the following information:

1. An executive summary (not to exceed two (2) pages) of the information contained in all the other parts of the Proposal Statement.
2. Name, address and telephone number of the firm or firms submitting the Proposal Statement pursuant to this RFP, and the name of the key contact person.
3. A description of the business organization (i.e., corporation, partnership, joint venture, etc.) of each firm, its ownership and its organizational structure:
  - a) Provide the names and business addresses of all Principals of the firm or firms submitting the Proposal Statement. For purposes of this RFP, "Principals" mean persons possessing an ownership or interest in the company. If the Respondent is a corporation, "Principals" shall include each investor who would have any amount of operational control over the Respondent and every stockholder having an ownership interest of 10% or more in the firm.
  - b) If a firm is a partially owned or a fully-owned subsidiary of another firm, identify the parent company and describe the nature and extent of the parents' approval rights over the activities of the firm submitting a Proposal Statement. Describe the approval process.
  - c) If the Respondent is a partnership or a joint venture or similar organization, provide comparable information as required in (b) above for each member of the partnership, joint venture or similar organization.
  - d) A statement that the Respondent has complied with all applicable affirmative action (or similar) requirements with respect to its business activities, together with evidence of such compliance.
4. The number of years the business organization has been under the current management.
5. Confirm appropriate federal and state licenses to perform activities.
6. Insurance Consultant must have a minimum of ten (10) years of experience in insurance consulting/brokerage with a focus on boards of education.
7. Insurance Consultant should have other boards of a similar size, and must submit a list of all references.
8. The education, qualifications, experience, and training of all persons who would be

assigned to provide services along with their names and titles. The consultant MUST possess both an Agency License and Individual Licenses for those persons who would be assigned to provide services to the Montclair Board of Education from the New Jersey Department of Banking and Insurance.

9. A listing of all other engagements where services of the types being proposed were provided in the past five (5) years. This should include other boards of education and other levels of government. The following information, with regards to other clients, must be submitted for review: premium sizes, number of employees at other clients, claims experience, experience with negotiations in other districts, preliminary and final settlement figures.
10. A description of all other areas of insurance consulting/brokerage activities, with emphasis on a description of those services of interest to a board of education client.
11. Any judgments, claims or suits pending or outstanding against company. If yes, please explain.
12. Whether the business organization is now or has been involved in any bankruptcy or re-organization proceedings in the last ten (10) years. If yes, please explain.
13. List all immediate relatives of Principal(s) of Respondent who are Board employees or elected officials of the Board. For purposes of the above, "immediate relative" means a spouse, parent, stepparent, brother, sister, child, stepchild, direct-line aunt or uncle, grandparent, grandchild, and in-laws by reason of relation.
16. The successful insurance consultant shall be able, when necessary, to meet with the Superintendent, Business Administrator, Board or designee and attend Board meetings, as necessary. Evidence of compliance with this request, as provided to other districts, must accompany this request for proposals.
17. The successful insurance consultant must provide documentation and financial information, as requested by the Board of Education.
18. The successful insurance consultant shall list a principal representative assigned to service the district. If the insurance consultant intends to designate an individual who is not an employee, such sub-contractor shall be named and shall provide all of the information required of the ICE as listed in the request for proposal, including but not limited to the financial agreement between the ICE and subcontractor.
19. The successful insurance consultant shall provide a list of ratings/proof of access to all major insurance companies servicing New Jersey.

## EVALUATION

The Board's objective in soliciting Proposal Statements is to enable it to select a firm or organization that will provide high quality and cost effective services to the citizens of Montclair. The Board will consider Proposal Statements only from firms or organizations that, in the Board's judgment, have demonstrated the capability and willingness to provide high quality services to the employees of the Board in the manner described in this RFP.

Proposals will be evaluated by the Board on the basis of the most advantageous submission, all relevant factors considered. The evaluation will consider:

1. Experience and reputation in the field.
2. Knowledge of the Board and the subject matter addressed under the contract.
3. Availability to accommodate the required meetings of the Board, as well as other factors demonstrated to be in the best interest of the Board.
4. The fees for the services.
5. Familiarity with Boards of Education of similar size.
6. History of success with cost savings for Boards of Educations.
7. Evaluation will consider the outcome of reference checks, from the references listed in #
8. Satisfaction of requirements listed in Section 3.
9. Experience working with professionals of the district assigned to administer the health benefits.

The Board reserves the right to award without any interviews. However, notwithstanding the foregoing, nothing contained within this Request for Proposal shall restrict the Board's ability to award.

# Required Forms



**NON-COLLUSION AFFIDAVIT**

STATE OF NEW JERSEY

MONTCLAIR BOARD OF EDUCATION

COUNTY OF OCEAN

I, \_\_\_\_\_ of the Municipality 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 firm of \_\_\_\_\_ : the bidder making the proposal for the above named project and that I executed the said 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 named project; and that all statements contained in said proposal and in this affidavit are true and correct and made with full knowledge that the state of New Jersey and the owner relies upon the truth of 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)

Subscribed and sworn to:

\_\_\_\_\_  
(Also, type or print name of affidavit under signature.)

before me on this \_\_\_\_\_ day of \_\_\_\_\_  
\_\_\_\_\_  
Notary Public of \_\_\_\_\_  
My commission expires \_\_\_\_\_, 20\_\_.

**MONTCLAIR BOARD OF EDUCATION  
AFFIRMATIVE ACTION SUPPLEMENT**

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

**MANDATORY AFFIRMATIVE ACTION LANGUAGE**

**PROCUREMENT, PROFESSIONAL AND 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, 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;

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.

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 worker's 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.

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.

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.

The contractor or subcontractor agrees to inform in writing appropriate recruitment agencies in the area, including employment agencies, placement bureaus, college, 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.

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.

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.

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).

Name of Firm \_\_\_\_\_

Date \_\_\_\_\_

Signature \_\_\_\_\_

Title \_\_\_\_\_

**REQUEST FOR REFERENCE FORM**

**Property and Casualty Insurance**

1. Name \_\_\_\_\_  
Address \_\_\_\_\_  
Telephone \_\_\_\_\_ Email address \_\_\_\_\_  
Contact Individual \_\_\_\_\_

2. Name \_\_\_\_\_  
Address \_\_\_\_\_  
Telephone \_\_\_\_\_ Email address \_\_\_\_\_  
Contact Individual \_\_\_\_\_

3. Name \_\_\_\_\_  
Address \_\_\_\_\_  
Telephone \_\_\_\_\_ Email address \_\_\_\_\_  
Contact Individual \_\_\_\_\_

4. Name \_\_\_\_\_  
Address \_\_\_\_\_  
Telephone \_\_\_\_\_ E-mail address \_\_\_\_\_  
Contact Individual \_\_\_\_\_

5. Name \_\_\_\_\_  
Address \_\_\_\_\_  
Telephone \_\_\_\_\_ E-mail address \_\_\_\_\_



# C. 271 POLITICAL CONTRIBUTION DISCLOSURE FORM

## Public Agency Instructions

This page provides guidance to public agencies entering into contracts with business entities that are required to file Political Contribution Disclosure forms with the agency. **It is not intended to be provided to contractors.** What follows are instructions on the use of form local units can provide to contractors that are required to disclose political contributions pursuant to N.J.S.A. 19:44A-20.26 (P.L. 2005, c. 271, s.2). Additional information on the process is available in Local Finance Notice 2006-1 ([www.nj.gov/dca/lgs/lfnslfnmenu.shtml](http://www.nj.gov/dca/lgs/lfnslfnmenu.shtml)).

1. The disclosure is required for all contracts in excess of \$17,500 that are **not awarded** pursuant to a “fair and open” process (N.J.S.A. 19:44A-20.7).
2. Due to the potential length of some contractor submissions, the public agency should consider allowing data to be submitted in electronic form (i.e., spreadsheet, pdf file, etc.). Submissions must be kept with the contract documents or in an appropriate computer file and be available for public access. **The form is worded to accept this alternate submission.** The text should be amended if electronic submission will not be allowed.
3. The submission must be **received from the contractor and** on file at least 10 days prior to award of the contract. Resolutions of award should reflect that the disclosure has been received and is on file.
4. The contractor must disclose contributions made to candidate and party committees covering a wide range of public agencies, including all public agencies that have elected officials in the county of the public agency, state legislative positions, and various state entities. The Division of Local Government Services recommends that contractors be provided a list of the affected agencies. This will assist contractors in determining the campaign and political committees of the officials and candidates affected by the disclosure.
  - a. The Division has prepared model disclosure forms for each county. They can be downloaded from the “County PCD Forms” link on the Pay-to-Play web site at [www.nj.gov/dca/lgs/p2p](http://www.nj.gov/dca/lgs/p2p). They will be updated from time-to-time as necessary.
  - b. A public agency using these forms **should edit them to properly reflect the correct legislative district(s)**. As the forms are county-based, **they list all legislative districts in each county. Districts that do not represent the public agency should be removed from the lists.**
  - c. Some contractors may find it easier to provide a single list that covers all contributions, regardless of the county. These submissions are appropriate and should be accepted.
  - d. The form may be used “as-is”, subject to edits as described herein.
  - e. The “Contractor Instructions” sheet is intended to be provided with the form. It is recommended that the Instructions and the form be printed on the same piece of paper. The form notes that the Instructions are printed on the back of the form; where that is not the case, the text should be edited accordingly.
  - f. The form is a Word document and can be edited to meet local needs, and posted for download on web sites, used as an e-mail attachment, or provided as a printed document.
5. It is recommended that the contractor also complete a “Stockholder Disclosure Certification.” This will assist the local unit in its obligation to ensure that contractor did not make any prohibited contributions to the committees listed on the Business Entity Disclosure Certification in the 12 months prior to the contract. (See Local Finance Notice 2006-7 for additional information on this obligation) A sample Certification form is part of this package and the instruction to complete it is included in the Contractor Instructions. **NOTE: This section is not applicable to Boards of Education.**

## 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.**

\* 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. 19:44A-20.26**

**County Name: Essex**

State: Governor, and Legislative Leadership Committees

Legislative District #s: 21, 27, 28, 29, 34, 36, 40

State Senator and two members of the General Assembly per district.

County:

Freeholders	County Clerk	Sheriff
County Executive	Surrogate	Registrar of Deeds

Municipalities (Mayor and members of governing body, regardless of title):

Belleville Township	Irvington Township	Orange City
Bloomfield Township	Livingston Township	Roseland Borough
Caldwell Borough	Maplewood Township	South Orange Village
Cedar Grove Township	Millburn Township	Verona Township
East Orange City	Montclair Township	West Caldwell Township
Essex Fells Township	Newark City	West Orange Township
Fairfield Township	North Caldwell Borough	
Glen Ridge Borough	Nutley Township	

Boards of Education (Members of the Board):

Belleville Town	Glen Ridge Borough	Nutley Town
Bloomfield Township	Irvington Township	Roseland Borough
Caldwell-West Caldwell	Livingston Township	South Orange-Maplewood
Cedar Grove Township	Millburn Township	Verona Borough
Essex Fells Borough	Newark City	West Essex Regional
Fairfield Township	North Caldwell Borough	West Orange Town

Fire Districts (Board of Fire Commissioners):

None

## STOCKHOLDER DISCLOSURE CERTIFICATION

**Name of Business:**

I certify that the list below contains the names and home addresses of all stockholders holding 10% or more of the issued and outstanding stock of the undersigned.

**OR**

I certify that no one stockholder owns 10% or more of the issued and outstanding stock of the undersigned.

**Check the box that represents the type of business organization:**

Partnership

Corporation

Sole Proprietorship

Limited Partnership

Limited Liability Corporation

Limited Liability Partnership

Subchapter S Corporation

**Sign and notarize the form below, and, if necessary, complete the stockholder list below.**

Stockholders:

Name:	Name:
Home Address:	Home Address:
Name:	Name:
Home Address:	Home Address:
Name:	Name:
Home Address:	Home Address:

Subscribed and sworn before me this ___ day of _____, 2___.	_____
(Notary Public)	(Affiant)
My Commission expires:	_____
	(Print name & title of affiant)
	(Corporate Seal)

Contact Individual \_\_\_\_\_

**PROPOSAL FORM**

Property and Casualty Insurance

(Consisting of Property Insurance, General Liability, Auto Liability & Physical Damage, Workers' Compensation & Employers Liability, and Professional Liability insurances)

To: Montclair Board of Education, 22 Valley Road, Montclair, NJ 07042

The flat fee commission for coverage listed above is as follows:

July 1, 2018 – June 30, 2019	_____
July 1, 2019 – June 30, 2020	_____
July 1, 2020 – June 30, 2021	_____
Total Three (3) Year Commission	_____

Two one-year renewals may be awarded in accordance with 18A:18A-42 if services are being performed in an effective and efficient manor.

**BIDDER'S INFORMATION:**

NAME OF BIDDER \_\_\_\_\_ SIGNATURE \_\_\_\_\_

ADDRESS \_\_\_\_\_ Title of Person Signing \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_ TEL.NO. \_\_\_\_\_ DATE \_\_\_\_\_



**STATE OF NEW JERSEY  
DEPARTMENT OF THE TREASURY  
DIVISION OF PURCHASE AND PROPERTY**

**33 WEST STATE STREET, P.O. BOX 230  
TRENTON, NEW JERSEY 08625-0230**

**DISCLOSURE OF INVESTMENT ACTIVITIES IN IRAN FORM**

**BID SOLICITATION #:** \_\_\_\_\_

**VENDOR/BIDDER:** \_\_\_\_\_

**PART 1**

**CERTIFICATION**

**VENDOR/BIDDER MUST COMPLETE PART 1 BY CHECKING ONE OF THE BOXES  
FAILURE TO CHECK ONE OF THE BOXES WILL RENDER THE PROPOSAL NON-RESPONSIVE**

Pursuant to 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 nor entity, nor any of its parents, subsidiaries, or affiliates, is identified on the 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 <http://www.state.nj.us/treasury/purchase/pdf/Chapter25List.pdf>. Vendors/Bidders must review this list prior to completing the below certification. **Failure to complete the certification will render a Vendor's/Bidder's proposal non-responsive.** 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**

A. I certify, pursuant to Public Law 2012, c. 25, that neither the Vendor/Bidder listed above nor any of its parents, subsidiaries, or affiliates is listed on the N.J. 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"). Disregard Part 2 and complete and sign the Certification below.

OR

B. 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 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 information will result in the proposal being rendered as nonresponsive and appropriate penalties, fines and/or sanctions will be assessed as provided by law.

**PART 2**

**PLEASE PROVIDE ADDITIONAL INFORMATION RELATED TO INVESTMENT ACTIVITIES IN IRAN**

If you checked Box "B" above, provide a detailed, accurate and precise description of the activities of the Vendor/Bidder, or one of its parents, subsidiaries or affiliates, engaged in the investment activities in Iran by completing the boxes below.

**ENTITY NAME:** \_\_\_\_\_

**RELATIONSHIP TO VENDOR/BIDDER:** \_\_\_\_\_

**DESCRIPTION OF ACTIVITIES:** \_\_\_\_\_

**DURATION OF ENGAGEMENT:** \_\_\_\_\_

**ANTICIPATED CESSATION DATE:** \_\_\_\_\_

**VENDOR/BIDDER CONTACT NAME:** \_\_\_\_\_

**VENDOR/BIDDER CONTACT PHONE No.:** \_\_\_\_\_

*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 \_\_\_\_\_