South Brunswick Board of Education

Middlesex County

2020-2021 School Year

Bid Specifications
for
Student Transportation Services
To and From School

Bid Number: 10-20

Legal Notice
Specifications
Prescribed Questionnaire
Statement of Ownership Disclosure
Affirmative Action Questionnaire/Statement
Non-Collusion Affidavit
Bid Sheet

May 2020
The South Brunswick Township Board of Education invites the submission of sealed bids for:

**STUDENT TRANSPORTATION ROUTES**  
**SPECIAL EDUCATION**

**Bid Number: 10-20**

Bids will be received up to 11:00 AM, prevailing time, on **Wednesday, June 10, 2020** at the School Business Office, 231 Blackhorse Lane, North Brunswick, NJ, 08902 at which time and place all bids will be publicly opened.

All bid submissions must be either hand delivered or sent via UPS, Fed Ex, etc. Bid submissions will not be accepted via the United States Postal Service as we cannot guarantee the receipt of those packages. Bids WILL NOT be accepted via email. **Mark all bid package submissions with BID ENCLOSED.**

Specifications may be obtained at the same office or requested by email to Steven Corso steven.corso@sbschools.org.

All bid packages will be sent out via email. You may also obtain Specification and Bid Forms from the district's website.

https://www.sbschools.org/

- **Departments > Business > Content RFP's and Bids**

The Board of Education reserves the right to reject any or all bids. Bidders are required to comply with the requirements of P.L. 1975, c 127, (N.J.S.A. 10:5-31 et seq. and N.J.A.C. 17:27).

By order of the South Brunswick Township Board of Education

**Special Notice—Office of the School Business Administrator**

The Board of Education during this emergent time, is currently closed and there is no guarantee the district offices will be opened by the advertised submission date. As the School Business Administrator/Board Secretary of the district, I am providing this Special Notice concerning the submission and opening of bids.
Submission of Bids
All potential bidders are to send their responses through the US Postal Service or other recognized delivery service that provides certification of delivery to the sender. Our business department is operating in the office on Monday, Wednesday, and Thursday 8 A.M. to 2 P.M. Bids may be dropped off at the South Brunswick Board of Education Building located at 231 Blackhorse Lane Monmouth Junction, NJ. Please leave all bid packages in the vestibule of our building. The building will be open from the hours of 8 A.M. to 2 P.M on Monday, Wednesday, and Thursday. Please coordinate this information with your delivery service.

BIDS ARE TO BE SUBMITTED TO:

David Pawlowski
School Business Administrator/Board Secretary
South Brunswick Board of Education

Delivery Service: 231 Blackhorse Lane
North Brunswick, New Jersey 08902

By Mail: PO Box 181
Monmouth Junction, New Jersey 08852

Opening of Bids—Online Live Streaming
The board of education is aware of N.J.S.A. 18A:18A-21 which states the following:

At such time and place the purchasing agent of the board of education shall publicly receive the bids and thereupon immediately proceed to unseal them and publicly announce the contents, which announcement shall be made in the presence of any parties bidding or their agents who are then and there present.

To ensure there is “social distancing” amongst all parties in the bid opening, the bid opening will be conducted via online live streaming using Zoom. The names of the vendors and their prices will be announced on the online live streaming which may be viewed by the general public and interested parties on the advertised bid date and time. If you would like to receive the credentials to join the Zoom meeting please contact Steven Corso at Steven.Corsosbschools.org.

All potential bidders are to visit the board of education website and click on the link pertaining to the Opening of Bids via Online Live Streaming.

https://www.sbschools.org/

David Pawlowski
School Business Administrator/Board Secretary
South Brunswick Board of Education
Specification for Student Transportation Services
To and From School

South Brunswick Board of Education

2020-2021 School Year

General Provisions

1. All contractors must comply with current applicable New Jersey statutes, regulations and with the policies and procedures of the district board of education governing student transportation.

2. The term of the contract will be from July 1, 2020 through June 30, 2021 according to the school calendar. Student transportation contracts include all the rules and procedures pertaining to student transportation though not expressly stated.

3. The Board of Education intends to award a contract for transportation as soon as possible after the date set for the opening of bids and to require the successful contractor to provide transportation in accordance with the school calendar. The attached school calendar is part of these specifications and of the contract.

4. The successful bidder is considered an independent contractor and is not an agent, servant, employee, or representative of the board of education.

5. As authorized by the district board of education, only enrolled eligible public and private school students, adults serving as chaperones or school personnel can be transported. The vehicle(s) assigned to the routes specified herein cannot be utilized for other purposes during the time periods designated by the route descriptions.

Children of drivers are not allowed on bus/van unless student has been assigned by Transportation Coordinator to the route.
6. Vehicle(s) must arrive and/or depart the assigned school(s) as indicated on the enclosed route descriptions.

Contractors shall, to the best of their ability, have the same driver cover both the matching pick up and drop off route. When a substitute driver is needed to have the same substitute to the greatest extent possible perform the same covered route.

7. No transportation contract can be subcontracted without the prior written approval of the board of education.

8. Bids are to be placed in a sealed envelope and plainly marked, “Bid for Student Transportation Services, South Brunswick School District” and presented to the board in session, authorized committee, designated official or employee of the board. The board or designated official will unseal the bids in the presence of the parties bidding and publicly announce the contents. Bids will be received at the South Brunswick Board of Education Business Office, located at 231 Blackhorse Lane, Monmouth Junction, 08852 up to 11:00 a.m. prevailing time on June 10, 2020.

9. If awarded a contract, your company/firm must ensure compliance with all applicable federal, state, and local regulations and certify such compliance to the board of education upon request.

10. The Board of Education reserves the right to transfer transportation contracts awarded under these specifications to another Board of Education.

The Board of Education reserves exclusive rights to the vehicle under contract and will have the right to alter the existing route to meet joint transportation agreements with districts that are near or along the existing routes. A contractor may not sell empty seats on a vehicle under contract to the Board of Education under terms of the contract.
11. If any litigation commences between the Board of Education and the successful bidder pursuant to the award of this contract, the venue for any suit must be in the Superior Court of New Jersey, Law Division, in the county where the Board of Education administering the contract is located.

Vehicles

1. Transportation equipment must be properly registered by the Motor Vehicle Commission, meet all current specifications in accordance with Federal and State law, the rules of the State Board of Education, and any additional specifications of this district’s board of education.

2. All vehicles must be systematically inspected twice within the school year and display a school bus certification inspection sticker to ensure that such vehicles and equipment are in safe and proper operating condition.

The District reserves the right to perform inspections of any and/or all vehicles by District representatives or independent inspectors at times and days it desires. The Contractor shall immediately repair or replace any equipment deemed to be unsuitable for student transportation and the vehicle shall remain unusable in the district until it meets the approval of the District’s agent or independent inspector. Other repairs or modifications desirable, but not required for student safety shall be addressed within 3 days of written notification to the Contractor.

All vehicles must be kept clean inside and outside. The Board of Education reserves the right to inspect contractor vehicles, used for South Brunswick School District school runs, and to order cleaning or other work necessary to maintain cleanliness and safety of students. If repairs, or other work, is not performed, the board has the right to order the vehicles not be used for the school district.

3. The contractor must provide and maintain an adequate number of school buses, including spares, to safely transport all students assigned to the routes contained in this bid and to assure uninterrupted service in the event of mechanical breakdown.
4. Vehicles must be able to accommodate route signs that are clearly visible to students and district personnel from at least the passenger side of the vehicle. Route signs must be posted on all vehicles for all routes each school day. Substitute buses covering routes must also have clearly visible route signs.

5. All vehicles must be equipped with radios connected to a base station manned at all times when the vehicle is in use transporting South Brunswick students.

6. Vehicles shall have a capacity of 54 passengers unless otherwise specified in bid. All vehicles to be used on routes must have an electronic child reminder system. Every driver must physically check the bus from back to front after each route to ensure all passengers have exited.

7. The Bidder agrees to provide vehicle maintenance on all buses and vans utilized under the contract at its own cost.

**Accident Reporting**

Contractors must ensure that every school bus driver will: a) immediately inform the principal(s) of the receiving school(s) and the school business administrator or designee of the district board of education providing the transportation following an accident which involves an injury, death, or property damage, b) complete and file the accident report as prescribed by the Commissioner of Education and deliver it to the principal(s) of the receiving school(s) by the conclusion of the next working day, and c) deliver the report to the school business administrator or designee of the district board of education providing the transportation after it is signed by the principal(s) of the receiving school(s) in accordance with NJAC 6A:27-12.2. In addition, the driver must also complete and file a motor vehicle accident report in accordance with NJSA 39-4:130.

**Reporting Student Left Unattended on the School Bus**

Every owner/operator of a school vehicle must immediately inform the administrator or principal of the receiving school and the chief school administrator of the district board of education providing for the transportation or their designee following an incident in which it is determined that a student was left unattended on the school bus at the end of the route. School district or school bus contractor personnel who discover, or to whom it is reported, that a student has been left on a school bus must immediately report the incident to the owner/operator of the vehicle. A student is considered to have been left unattended on the school bus at the end of the route when the driver has left the vicinity of the bus.
Drivers/Aides

1. The driver must be a reliable person of good character who possesses the qualifications and communication skills necessary to perform the duties of the position, and comply with the rules set forth for drivers in all federal, state and local regulations including, but not limited to, the Omnibus Transportation Employee Testing Act, NJSA 18A:6-7.6 through 18A:6-7.12 and NJSA 18A:39-17 through 20 (background check) (Note: This requirement also applies to Certified Mobility Assistance Vehicle (MAV) Technicians transporting students with medical needs to and from school or school related activities in mobility assistance vehicles.), and tuberculosis testing.

2. If a student assigned to a special education route is not present at the assigned bus stop for three consecutive days, the contractor must report this absence to the district transportation supervisor.

3. The bus driver must always be in full charge of the school bus and is required to report unmanageable students to the district transportation supervisor and principal of the receiving school on the district prescribed incident/discipline form.

4. A bus aide assigned to a route awarded by this bid must be a reliable person of good character who possesses the qualifications and communication skills necessary to perform the duties of the position and is required to comply with the criminal background check and tuberculosis testing as prescribed by law.

5. Bus aides must attend to the special needs of students, maintain order on the vehicle to ensure the safety of all students, assist students getting on and off the vehicle as needed, and other duties which may be specified by the board of education.

6. If the Board of Education finds any driver or aide assigned to a vehicle operating under a contract awarded by this bid to be unsuitable for the position because of a lack of skills necessary to perform the job duties, inability to control students, failure to comply with the rules and regulations, incapacity, unbecoming conduct, or other good cause, the contractor may be required to remove the driver and/or aide from the route or all district routes. If the contractor fails to
comply with this provision, the contractor may be required to show cause why this failure to comply is not deemed to constitute a breach of contract and may set aside and annul the contract.

**Executive County Superintendent Approval**

All transportation contracts require the approval of the Executive County Superintendent of Schools.

**Payment Terms**

1. Payments to contractors shall be made on or about the 7th day after approval of the board at the board’s regular monthly meeting. Payments will be made in monthly installments, provided an appropriate invoice is submitted by the 5th of the month.

2. The contractor must execute the contract and submit it to the district board of education with all required related documents for the district board of education to comply with the timeline for submission of contracts to the county superintendent. Failure to do so may result in a delay in the scheduled payment of services. Contractors should visit the Department of Education’s Student Transportation website to become familiar with the contract to be executed.

3. Payment for the month of June will be made on or about the 7th day after approval of the board at the board’s regular monthly meeting.

4. Per Diem contracts will be calculated on the actual number of days transportation services were performed.

5. Payments are subject to approval by the board of education. Therefore, payments may be delayed depending on the Board’s meeting schedule.
Emergency Provisions

1. In the event the school is closed due to inclement weather or other emergencies, the contractor will be notified as soon as possible by the public-school authorities providing transportation. Contractors are also advised to check online for school closing announcements.

2. In an emergency where the contractor cannot meet the schedule, or if the school has a change in schedule, the party responsible for any change must immediately notify the other party.

Basis of Bid and Adjustments

1. The bidder must submit the bid on the bid sheet contained in these bid specifications. Bids are submitted on a per diem or per annum basis as indicated on the enclosed bid sheet. Other bid sheets are not acceptable.

2. If there is a change in the described route, the amount of the contract will be adjusted as specified in the bid. Bids which do not include an adjustment amount will not be accepted.

3. The net result of any mileage adjustment to a nonpublic school transportation contract cannot exceed the maximum cost per student in accordance with NJS A 18A:39-1a. Calculations to determine the per student cost must include all students on the route, public and nonpublic.

Insurance Coverage

1. Unless otherwise specified by the board of education, the contractor must provide automotive liability insurance in the minimum amount required by the Motor Vehicle Commission and Department of Education regulations. If the board of education requires an insurance coverage greater than the minimum amount, the contractor must provide automotive liability insurance in the amount of $5,000,000 combined single limit per occurrence. Bidders are required to provide, with the bid, evidence of their ability to obtain the required insurance coverage. A certificate of insurance for the duration of the contract must be presented by the successful bidder. The
certificate of insurance must state that the contracting board of education is an additional insured party to the policy.

2. The district board of education and the Executive County Superintendent must be notified by the insured whenever any policy is cancelled. Notification must be made within 48 hours of the receipt of the notification of the cancellation by the insured, and before the cancellation takes effect.

3. The contractor will protect, defend, and hold harmless the Board of Education from any lawsuits or actions of every nature and description brought against it for, or on account of any injuries or damages received or sustained by any party or parties by or from any acts of the contractor, its servants or agents as a result of the performance of the contract.

The bidder shall provide general liability insurance in the amount of not less than $2,000,000.00 which includes sexual molestation coverage.

**Bid Guarantee**

1. Each bid shall be accompanied by a bid bond, cashier’s or certified check for five percent, (5%), of the amount of the annual contract cost, but in no case may the certified check, cashier’s check or bid bond exceed $50,000. No other form of guarantee is authorized. This guarantee shall be made payable to the South Brunswick Board of Education. Such deposit shall be forfeited upon refusal of a bidder to execute a contract: otherwise, checks shall be returned when the contract is executed and a surety, (performance), bond is filed with the Board of Education. The bid guarantee for all unsuccessful bidders, except for the three lowest bidders, will be returned within ten, (10), days after the bid opening, (Saturdays, Sundays and holidays excepted). The annual contract amount of per diem contracts shall be calculated by multiplying the total per diem cost by 180 days.

2. Each bid must be accompanied by a Consent of Surety.
Performance Guarantee

1. A corporate and/or performance surety bond in an amount equal to the annual amount of the contract shall be required of the successful bidder. Each bid shall be accompanied by a signed Prescribed Form of Questionnaires, included in these specifications. The bond to be provided for per diem contracts shall be equal to the total per diem bid multiplied by 180 days. The bonding company is responsible for notification to the District if, at any time, the successful bidder does not fulfill the monetary requirements to the bidding company. The bond shall include the Multi-contract number or Route number(s).

2. Personal bonds are NOT permitted.

Breach of Contract/Penalties

In the event the bidder fails to provide service in accordance with these specifications and stated requirements of the routes, the bidder will be considered in Breach of Contract and may be subject to a penalty deduction in addition to the route deduction. Per diem deductions are based on a 180-day school year. If the Bidder consistently fails to perform satisfactorily, or to furnish safe and adequate personnel and equipment, or otherwise fails to comply with the terms of the contract, the School District may cancel the contract and procure service elsewhere. The School District, in its sole discretion, may call for the forfeiture of the Performance Bond.

1. Tardiness without good cause. In general, all routes are designed to arrive at the school about ten minutes before the start or dismissal bell. If a vehicle does not arrive before the start or dismissal bell it is considered late. A driver or aide no show is not a good cause for lateness. PENALTY - Per diem cost of contract for each morning or afternoon trip based upon a 180-day school year.

2. Driver/Contractor failure to pick up all pupils assigned to a route without good cause. PENALTY - Per diem cost of contract for each morning or afternoon trip based upon a 180-day school year.

3. Failure to operate either morning and/or afternoon trips on any one route without a good cause. PENALTY – Per diem cost of contract for each morning or afternoon trip based on a 180-day school year.

4. Drivers changing routes, making unauthorized stops and/or transporting other than assigned students, PENALTY - Per diem cost of contract for each morning or afternoon trip based upon a 180-day school year.
5. Miscellaneous penalty for infractions of this contract not included above. PENALTY - $150 per incident per day.

6. If necessary, for district mechanic to cover breakdown. CHARGE - $125 per hour for mechanic; minimum three hours plus applicable penalties.

7. If necessary, to cover any contracted route for safety or performance reasons. CHARGE - $250 per route covered for use of a district bus and driver plus applicable penalties. CHARGE - $150 per route covered for use of district driver and contractor bus plus applicable penalties.

8. Any tier package altered, switched, or combined without written authorization by the District, PENALTY - $500 per diem per incident.

Training Programs

1. The contractor must ensure that drivers and aides are properly trained to perform their duties, which must include, at a minimum, the training requirements listed at NJSA 18A:39-19.1a and NJAC 6A:27-11.3. This training requirement must be completed twice each calendar year.

2. The contractor must administer a safety education program for all permanent and substitute drivers and bus aides according to NJSA 18A:39-19.1a and NJAC 6A:27-11.3 twice each calendar year.

3. Drivers and aides are required to participate in scheduled school bus evacuation drills.

Routes

1. Within 10 days of the start of the contract, the contractor shall submit to the district Board of Education a description of the actual streets traveled for routes for the transportation of special education students for which the streets to be traveled are not described by the Board of Education on the route description contained in the bid. Attached to this Bid Specification are the AM routes which form the basis for the bid. PM routes are operated the same as AM routes or in reverse.

2. Drivers shall take the most direct, safest route to and from child's home to school.
3. No contractor/driver has the authority to change or alter routes, stops, times without notification and approval of the District Supervisor of Transportation. Each route is subject to additional and/or deletion of stops/students by the District Supervisor of Transportation.

4. The Board of Education reserves the right to revise any and all routes to suit the educational program at any time and such revision shall be deemed an ordinary part of the contract. Any revision that shall create an increase or decrease of mileage, not to exceed five percent of the total base service mileage, as specified in routes attached, shall be deemed an ordinary part of this bid and the contract to follow. A monthly adjustment will be made for mileage in excess of five percent. Said adjustment will result in either a rebate to the School District or added compensation to the Bidder.

5. All vehicles will clearly display the route numbers at least on the passenger side of the vehicle near the passenger door or one widow back from the passenger door. The route signs must be displayed on each vehicle, every school day.

6. Seating charts must be completed on forms provided by the district for each route. Seating charts must be submitted to the district by the end of the third week of September each year. Drivers must update and submit seating charts throughout the year as needed.

7. The bidder shall only transport passengers assigned by the District as evidenced by the student list for each route and according to NJAC 6A:27-1.4.

8. No route package may be changed, combined, or switched with any other route without the written consent of the district.

9. The District must be notified of any driver or aide change prior to the start of the route.

10. If a student assigned to a special education route is not present at the assigned bus stop for three consecutive days, the contractor shall report this absence to the district transportation office on the third day.
SUPERVISION

1. The Bidder will provide a qualified supervisor and an adequate staff of support employees. The supervisor will be trained and experienced in the supervision of bus and van drivers and aides. The supervisor or assistant will be available during the driver’s regular working hours (at least between 6:30 a.m. and 4:30 p.m.), and at all other reasonable times to confer with the designated administrators of the School District concerning the service provided by the Bidder.

2. Bidder will agree to make supervisors, drivers and other staff available for reasonable school and community related inquiries upon request and notice from the School District at no additional cost.

AMENITIES

1. Two-Way Radios the bidder will agree to install, maintain and operate two-way radios in all vehicles and substitute vehicles contracted to the school district. All costs for the operation of these radios shall be borne by the bidder. If available, the bidder may utilize the district’s radio frequency. If the bidder chooses to use the district’s radio frequency, only transmissions relating to district transportation can be made at any time. If the bidder chooses to use another frequency, then the bidder will provide to the district a means to monitor and communicate directly with the bidder’s vehicles and base.

2. Video Supervision  The district prefers all buses be video camera equipped but does not require it. The district does require the vendor to supply video equipped buses on routes it designates from time to time. The vendor must supply the district with the requested video from those buses before the next day close of the district business office. The vendor must have additional recording devices to permit daily recording when media has been submitted to the district for review. The vendor must supply the district with the means to view the videos from the vendor’s camera system. Bus cameras shall be checked at least quarterly. Failure to submit a requested video may result in a $50 per day per incident penalty.

BULK BIDDING

1. Bulk bidding is encouraged by indicating a percentage discount on the bid sheet.
MODIFICATIONS

1. Any modifications to these specifications after the public advertisement and prior to the scheduled bid opening will be made known by fax/email to all bidders who requested specifications.

2. The Board of Education reserves the right to make modifications of routes subject to the provisions of the bid and of the rules of the State Board of Education. The to/from routes are subject to additional and/or deletion of stops/students for the term of the contract and subsequent renewals.

Affirmative Action

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 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, affectional or sexual orientation, gender identity or expression, disability, nationality or sex. 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, affectional or sexual orientation, gender identity or expression, disability, nationality or sex.

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 will 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 employ minority and women workers consistent with the applicable county employment goals established in accordance with N.J.A.C. 17:27-5.2, or a binding determination of the applicable county employment goals determined by the Division, pursuant to 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, labor unions, that it does not discriminate on the basis of age, 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 applicable 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, 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 must 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:

1. Letter of Federal Affirmative Action Plan Approval
2. Certificate of Employee Information Report
3. Employee Information Report Form AA302
The contractor and its subcontractors must furnish such reports or other documents to the Division of Contract Compliance & EEO as requested by the office from time to time to carry out the purposes of these regulations. Public agencies will furnish such information as requested by the Division of Contract Compliance & EEO to conduct a compliance investigation pursuant to Subchapter 10 of the Administrative Code at N.J.A.C. 17:27.

Ownership Disclosure

All bidders are hereby notified that every corporation and partnership, according to the provision of Chapter 33, Laws of 1977 of the State of New Jersey, must submit a statement prior to the receipt of the bid or accompanying the bid, setting forth the names and addresses of all stockholders in the corporation or partnership who own 10% or more of its stock, of any class or of all partners in the partnership who own a 10% or greater interest. If one or more such stockholder or partner is itself a corporation or partnership, the stockholders holding 10% or more of that corporation’s stock, or the individual partner’s 10% or greater interest in that partnership must also be listed. The disclosure continues until names and addresses of every non-corporate stockholder, and individual partner, exceeding the 10% ownership criteria established in this act, has been listed.

Business Registration

All bidders are hereby notified that every business organization must submit with their bid a copy of their Business Registration Certificate, in compliance with P.L. 2004, c 57 of the State of New Jersey.
Drug and Alcohol Testing

If awarded a contract, your company/firm is required to certify to the board of education that you follow the drug and alcohol requirements of the Omnibus Transportation Employee Testing Act.

Background Checks

1. The contractor must ensure compliance with the requirements of NJSA 18A:39-17 through 20 governing criminal history background checks and must annually submit required documents to the county superintendent of schools on or before August 31 or upon employment for newly hired drivers.

2. The contractor must ensure compliance with the requirements of NJSA 18A:6-7.6 through 12 governing child abuse and sexual misconduct checks. Additional information on this requirement is available from the Office of Student Protection’s “Pre-Employment Resources” webpage: https://www.state.nj.us/education/crimhist/preemployment/.

Driver and Aide Training

The contractor must comply with the requirements of NJSA 18A:39-19.1a, 2, and 3 governing the training of school bus drivers and aides and must annually submit required documents to the county superintendent of schools on or before August 31 or upon employment for newly hired drivers and/or aides.

Disclosure of Political Contributions

The contractor must file an annual disclosure statement on political contributions with the New Jersey Election Law Enforcement Commission pursuant to NJSA 19:44A-20.13 (P.L. 2005, c.271, s.3) if the contractor receives contracts in the aggregate exceeding $50,000 from public entities in a calendar year. It is the contractor’s responsibility to determine if filing is necessary. Additional information on this requirement is available from ELEC at 888-313-3532 or at www.elec.state.nj.us.
Maintenance of Contract Records

The relevant records of private vendors or other persons entering into contracts with covered entities are subject to audit or review by the Office of the State Comptroller pursuant to NJSA 52:15C-14(d). The contractor must maintain all documentation related to products, transactions, or services under this contract for a period of five years from the date of final payment. These records must available to the New Jersey Office of the State Comptroller upon request.

Notification Required when a School Bus Driver’s License is suspended or revoked

When a contractor providing pupil transportation services under contract with a board of education is notified by the Department of Education that a school bus driver employed by the provider has had their bus driver’s license suspended or revoked, the employing transportation provider, within one business day of the notification, must provide a statement to the NJ Department of Education verifying that the school bus driver no longer operates a school bus for the board or contractor.

The following documents must be submitted for your bid to be considered:

1. Bidder’s Guarantee
2. Business Registration Certificate
3. Evidence of the Bidder’s Ability to Obtain the Required Insurance Coverage
4. Omnibus Transportation Employee Testing Act Compliance Assurance
5. School Bus Driver Annual Certification Compliance Assurance
6. Disclosure of Investment Activities in Iran
7. Prescribed Questionnaire
8. Consent of Surety
9. Statement of Ownership Disclosure
10. Coordinated Transportation Services Agency Membership Form (CTSA only)
11. Affirmative Action Documentation or Questionnaire
12. Non-Collusion Affidavit
13. Bid Sheet
STATEMENT OF ASSURANCE

OMNIBUS TRANSPORTATION EMPLOYEE TESTING ACT COMPLIANCE
(To accompany bid)

The following firm

_________ is currently under contract

_________ will be contracted with

to provide a controlled substance testing program to our company as required by the Omnibus Transportation Employee Testing Act:

Name of Firm: __________________________________________

Address: __________________________________________

Contact Person: _______________________________________

Telephone: __________________________________________

Authorized Bidder’s Name and Title _____________________________ (Print or Type)

Authorized Signature _______________________________________

Company Name ___________________________________________

Address _________________________________________________
STATEMENT OF ASSURANCE

SCHOOL BUS DRIVER ANNUAL CERTIFICATION TO THE EXECUTIVE COUNTY SUPERINTENDENT OF SCHOOLS
(To accompany bid)

I certify compliance with the requirements of N.J.S.A. 18A:39-17 through 20 governing criminal history background checks, and shall annually submit required documents to the Executive County Superintendent of Schools on or before August 31 or upon employment for newly hired drivers.

I also certify that prior to assigning a newly hired, currently approved school bus driver to a bus route, a school bus driver transmittal form is completed and submitted to the New Jersey Department of Education Criminal History Review Unit.

Authorized Bidder’s Name and Title ________________________________
Authorized Signature ___________________________________________
Company Name __________________________________________________
Address ________________________________________________________
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’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 the 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 of the Vendor/Bidder, or one of its parents, subsidiaries or affiliates, engaged in the investment activities in Iran by completing the boxes below.

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 herein, 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

DPP Rev. 6.19.17 Page 1 of 1
PRESCRIBED FORM OF QUESTIONNAIRE
(To accompany bid)

SURETY BOND

_____ CORPORATE – Consent of Surety Attached

FAMILIARITY WITH CONDITIONS OF CONTRACT

Have you read carefully the applicable New Jersey Statutes, regulations, procedures, the rules of the local board of education pertaining to student transportation, the specifications upon the basis of which the accompanying bid is submitted, and the contract which the successful bidder will be required to execute?  Yes ____  No ____

EXPERIENCE OF BIDDER

1. Have you had previous experience in school or other bus transportation?  ____ Yes  ____ No

2. If yes, how many years experience?  ____________

3. Briefly state the nature of this experience.  ______________________________________________________

Company Name ____________________________________________
Address ___________________________________________________
Authorized Bidder’s Name and Title __________________________
Authorized Signature _____________________________________
STATEMENT OF OWNERSHIP DISCLOSURE

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: ____________________________________________________________

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

☐ 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)

(Please attach additional sheets if more space is needed):

<table>
<thead>
<tr>
<th>Name of Individual or Business Entity</th>
<th>Home Address (for Individuals) or Business Address</th>
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<tbody>
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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.

<table>
<thead>
<tr>
<th>Website (URL) containing the last annual SEC (or foreign equivalent) filing</th>
<th>Page #’s</th>
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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 noncorporate 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.

<table>
<thead>
<tr>
<th>Stockholder/Partner/Member and Corresponding Entity Listed in Part II</th>
<th>Home Address (for Individuals) or Business Address</th>
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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 <name of contracting unit> 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 <type of contracting unit> to notify the <type of contracting unit> 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 <type of contracting unit> to declare any contract(s) resulting from this certification void and unenforceable.

<table>
<thead>
<tr>
<th>Full Name (Print):</th>
<th>Title:</th>
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<table>
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<th>Signature:</th>
<th>Date:</th>
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</table>

Coordinated Transportation Services Agency Membership Form
(To accompany the bid – CTSA only)
BOARD OF EDUCATION


AFFIRMATIVE ACTION
QUESTIONNAIRE
(To accompany bid)

COMPANY NAME ________________________________

1. Our company has a federal Affirmative Action Plan approval.
   
   ____ YES    ____ NO

   A. If yes, a 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 (AA-302) will be mailed to you. Complete the form and forward it to the Affirmative Action Office, Department of Treasury, Division of Purchase & Property, Contract Compliance Audit Unit, EEO Monitoring Program
   P.O. Box 206, 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.

AUTHORIZED BIDDER ____________________________  (Print or Type)

TITLE ____________________________ DATE __________
   (Print or Type)

SIGNATURE ________________________________
FORM OF NON-COLLUSION AFFIDAVIT
(To accompany the bid)

STATE OF NEW JERSEY, COUNTY OF ____________________________

I, __________________________________________, of the ____________________________,
(city, town, borough)
of ____________________________, in the County of ____________________________,
State of ____________________________, of full age, being duly sworn according to law on
my oath depose and say that:

I am __________________________________________, of the firm/agency of ____________________________, the bidder making the
Proposal for the Student Transportation Contracts, 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, participated in drafting these specifications or route descriptions, 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

________________________________________
Company/Agency Name (Print or Type)

________________________________________
Authorized Representative - Name and Title (Print or Type) Authorized Signature

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

Bid Number ____________________________

Subscribed and sworn before me this ____________ day of ____________, 20__

________________________________________
Notary Public of New Jersey
(Seal)

My commission expires ____________________________, 20__
Route Descriptions
SOUTH BRUNSWICK SCHOOL DISTRICT
ROUTE DESCRIPTION
OUT OF DISTRICT STUDENTS

ROUTE NO: ALC4

DESTINATION: ACADEMY LEARNING CENTER
145 Pergola Ave, Monroeville, NJ
School Hours: In 10:30 am (*No PM route)

ARRIVAL TIME AT FIRST STOP 9:50 am

STOP 9 Degas Dr (wheelchair)
STOP ACADEMY LEARNING CENTER

The direction of the vehicle from the last stop shall be along the safest most direct route to the destination.

NOTE: Within 10 days of the start of the contract, the contractor must submit to the district board of education a description of the actual streets traveled.

Vehicle shall arrive at the destination no earlier than 10:20 am or later than 10:25 am
P.M. Run begins ** this route does not have a PM route

Minimum Vehicle Capacity: School bus for 1 wheelchair student

Special Needs: This route requires an aide and air conditioning

THE STARTING DATE OF THIS ROUTE IS: JULY 2020
SOUTH BRUNSWICK SCHOOL DISTRICT
ROUTE DESCRIPTION
OUT OF DISTRICT STUDENTS

ROUTE NO: BRG

DESTINATION: BRIDGE ACADEMY
1958B Lawrenceville Rd, Lawrenceville
School Hours: 8:00 am – 2:45 pm

ARRIVAL TIME AT FIRST STOP 7:30 am

STOP 202 Dahlia Circle
STOP 677 Ridge Rd
STOP BRIDGE ACADEMY

The direction of the vehicle from the last stop shall be along the safest most direct route to the destination.

NOTE: Within 10 days of the start of the contract, the contractor must submit to the district board of education a description of the actual streets traveled.

Vehicle shall arrive at the destination no earlier than 7:45 am or later than 7:55 am
P.M. Run begins at the BRIDGE ACADEMY at 2:45 pm and shall be the reverse of the A.M. run unless so indicated.

Minimum Vehicle Capacity: 16 passenger school bus

Special Needs: Needs Air-conditioning

THE STARTING DATE OF THIS ROUTE IS: SEPTEMBER 2020
SOUTH BRUNSWICK SCHOOL DISTRICT
ROUTE DESCRIPTION
OUT OF DISTRICT STUDENTS

ROUTE NO: BRBE

DESTINATION: BRIGHT BEGINNINGS
1616 Stelton Rd, Piscataway
School Hours: 9:00 am – 2:30 pm

ARRIVAL TIME AT FIRST STOP 8:00 am

STOP 10 Palm St (wheelchair student)
STOP BRIGHT BEGINNINGS

The direction of the vehicle from the last stop shall be along the safest most direct route to the destination.

NOTE: Within 10 days of the start of the contract, the contractor must submit to the district board of education a description of the actual streets traveled.

Vehicle shall arrive at the destination no earlier than 7:50 am or later than 7:55 am
P.M. Run begins at the BRIGHT BEGINNINGS at 2:30 pm and shall be the reverse of the A.M. run unless so indicated.

Minimum Vehicle Capacity: WC equip school bus

Special Needs: Aide needed and wheelchair accessible bus

THE STARTING DATE OF THIS ROUTE IS: JULY 2020
SOUTH BRUNSWICK SCHOOL DISTRICT
ROUTE DESCRIPTION
OUT OF DISTRICT STUDENTS

ROUTE NO: JCAP

DESTINATION: JOSEPH CAPELLO SCHOOL
1072 Old Trenton Rd, Trenton
School Hours: 9:00 am – 3:00 pm

ARRIVAL TIME AT FIRST STOP 8:00 am

STOP 16 Liberty Dr
STOP Joseph Capello School

The direction of the vehicle from the last stop shall be along the safest most direct route to the destination.

NOTE: Within 10 days of the start of the contract, the contractor must submit to the district board of education a description of the actual streets traveled.

Vehicle shall arrive at the destination no earlier than 8:45 am or later than 8:55 am
P.M. Run begins at the JOSEPH CAPELLO SCHOOL at 3:00 pm and shall be the reverse of the A.M. run unless so indicated.

Minimum Vehicle Capacity: 7 passenger school vehicle

Special Needs: Aide needed and Carseat

THE STARTING DATE OF THIS ROUTE IS: JULY 2020
SOUTH BRUNSWICK SCHOOL DISTRICT
ROUTE DESCRIPTION
OUT OF DISTRICT STUDENTS

ROUTE NO: MERE

DESTINATION: MERCER ELEMENTARY SCHOOL
1020 Old Trenton Rd, Trenton
School Hours: 8:40 am – 2:40 pm

ARRIVAL TIME AT FIRST STOP 7:30 am

STOP G7 Quincy Circle
STOP 966 Ridge Rd
STOP Mercer Elementary School

The direction of the vehicle from the last stop shall be along the safest most direct route to the destination.

NOTE: Within 10 days of the start of the contract, the contractor must submit to the district board of education a description of the actual streets traveled.

Vehicle shall arrive at the destination no earlier than 8:20 am or later than 8:30 am
P.M. Run begins at the MERCER ELEMENTARY at 2:40 pm and shall be the reverse of the A.M. run unless so indicated.

Minimum Vehicle Capacity: 7 passenger school vehicle

Special Needs: Aide needed

THE STARTING DATE OF THIS ROUTE IS: JULY 2020
SOUTH BRUNSWICK SCHOOL DISTRICT
ROUTE DESCRIPTION
OUT OF DISTRICT STUDENTS

ROUTE NO: PVNM

DESTINATION: PVT. NICHOLAS MINUE SCHOOL
99 Post Rd, Carteret
School Hours: 8:35 am – 2:50 pm

ARRIVAL TIME AT FIRST STOP 7:15 am

STOP 15 Deans Lane
STOP Pvt. Nicholas Minue School

The direction of the vehicle from the last stop shall be along the safest most direct route to the destination.

NOTE: Within 10 days of the start of the contract, the contractor must submit to the district board of education a description of the actual streets traveled.

Vehicle shall arrive at the destination no earlier than 8:20 am or later than 8:30 am
P.M. Run begins at the PVT NICHOLAS MINUE SCHOOL at 2:50 pm and shall be the reverse of the A.M. run unless so indicated.

Minimum Vehicle Capacity: 7 passenger school vehicle

Special Needs: None

THE STARTING DATE OF THIS ROUTE IS: JULY 2020
SOUTH BRUNSWICK SCHOOL DISTRICT
ROUTE DESCRIPTION
OUT OF DISTRICT STUDENTS

ROUTE NO: SUMS

DESTINATION: SUMMIT SPEECH
705 Central Ave, New Providence
School Hours: 8:45 am – 2:45 pm

ARRIVAL TIME AT FIRST STOP 7:30 am
STOP 146 Kendall Rd
STOP SUMMIT SPEECH

The direction of the vehicle from the last stop shall be along the safest most direct route to the destination.

NOTE: Within 10 days of the start of the contract, the contractor must submit to the district board of education a description of the actual streets traveled.

Vehicle shall arrive at the destination no earlier than 8:25 am or later than 8:35 am
P.M. Run begins at the SUMMIT SPEECH at 2:45 pm and shall be the reverse of the A.M. run unless so indicated.

Minimum Vehicle Capacity: 7 passenger school vehicle

Special Needs: Aide needed

THE STARTING DATE OF THIS ROUTE IS: JULY 2020
BID SHEET

SOUTH BRUNSWICK
Board of Education

Student Transportation Services

- Bids which do not include an adjustment amount will not be accepted.

- In the event bid submissions for a route cost result in a tie bid, the award shall be based on the lowest aide cost (if applicable). If there is no aide cost, or if that cost also results in a tie bid, the award shall be based on the lowest increase/decrease adjustment cost unless otherwise specified by the board.

- Alternate bids not solicited by the Board of Education will not be accepted.

- The following routes and aide (if applicable) are to be bid on a PER DIEM basis.

- Routes which require an aide are so indicated by an asterisk (*).

- I hereby submit the following bid(s) to transport students during the 2019-2020 school year in accordance with your advertisement, specifications and route description.

Per Diem

<table>
<thead>
<tr>
<th>Route Number</th>
<th>Route Cost</th>
<th>Increase/Decrease Adjustment Cost</th>
<th>Per Aide Cost (if applicable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALC4*</td>
<td>$_________</td>
<td>$_________</td>
<td>$_____</td>
</tr>
<tr>
<td>BRG</td>
<td>$_________</td>
<td>$_________</td>
<td>$_____</td>
</tr>
<tr>
<td>BRBE*</td>
<td>$_________</td>
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<tr>
<td>JCAP*</td>
<td>$_________</td>
<td>$_________</td>
<td>$_____</td>
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<tr>
<td>MERF*</td>
<td>$_________</td>
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<tr>
<td>PVNM</td>
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<tr>
<td>SUMS*</td>
<td>$_________</td>
<td>$_________</td>
<td>$_____</td>
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</tbody>
</table>

TOTAL
PER DIEM BID $_________ (Include route and aide costs, where applicable.)

Bulk Bid – If I am awarded all routes as identified by the individual routes bid above, a _______% deduction shall be applied to each route and aide cost, where applicable.
BID SHEET

SOUTH BRUNSWICK
Board of Education

Student Transportation Services

Contracts will be awarded on an individual or bulk basis whichever is least costly to the board.

_________________________  _______________________
Bidder's Name (Print or Type)  Company Name

_________________________
Company Address and Telephone Number

_________________________  _______________________
Bidder's Signature  Date
This calendar allows for up to 3 emergency make-up days. If schools are closed due to an emergency, days will be made up in the following order:

Day #1 - June 1st
Day #2 - April 5th
Day #3 - May 28th
Day #4 - Reduce to 180 instructional days (Students/State mandated 180 days)

Additional snow days, if needed will be taken from Spring Break.

Schools will be closed on the above days only if there is no need to make up days lost due to emergencies.
South Brunswick Board of Education

Chapter 271
Political Contribution Disclosure Form
(Contracts that Exceed $17,500.00)
Ref. N.J.S.A. 19:44-20.26

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:

<table>
<thead>
<tr>
<th>Date of Contribution</th>
<th>Amount of Contribution</th>
<th>Name of Recipient Elected Official/Committee/Candidate</th>
<th>Name of Contributor</th>
</tr>
</thead>
<tbody>
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</table>

The Business Entity may attach additional pages if needed.

☐ 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 ___________________________

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
  - 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.

P.L. 2005, c.271
AN ACT authorizing unit of local government to impose limits on political contributions by contractors and supplementing Title 40A of the New Jersey Statutes and Title 19 of the Revised Statutes.

BE IT ENACTED by the Senate and General Assembly of the State of New Jersey:

40A:11-51 1. a. A county, municipality, independent authority, board of education, or fire district is hereby authorized to establish by ordinance, resolution or regulation, as may be appropriate, measures limiting the awarding of public contracts therefrom to business entities that have made a contribution pursuant to P.L.1973, c.83 (C.19:44A-1 et seq.) and limiting the contributions that the holders of a contract can make during the term of a contract, notwithstanding the provisions and parameters of sections 1 through 12 of P.L.2004, c.19 (C.19:44A-20.2 et al.) and section 22 of P.L.1973, c.83 (C.19:44A-22).

b. The provisions of P.L.2004, c.19 shall not be construed to supersede or preempt any ordinance, resolution or regulation of a unit of local government that limits political contributions by business entities performing or seeking to perform government contracts. Any ordinance, resolution or regulation in effect on the effective date of P.L.2004, c.19 shall remain in effect and those adopted after that effective date shall be valid and enforceable.

c. An ordinance, resolution or regulation adopted or promulgated as provided in this section shall be filed with the Secretary of State.

19:44A-20.26 2. a. Not later than 10 days prior to entering into any contract having an anticipated value in excess of $17,500, except for a contract that is required by law to be publicly advertised for bids, a State agency, county, municipality, independent authority board of education, or fire district shall require any business entity bidding thereon or negotiating therefor, to submit along with its bid or price quote, a list of political contributions as set forth in this subsection that are reportable by the recipient pursuant to the provisions of P.L.1973, c.83 (C.19:44A-1 et seq.) and that were made by the business entity during the preceding 12 month period, along with the amount of each contribution and the name of the recipient of each contribution. A business entity contracting with a State agency shall disclose contributions to any State, county, municipal committee of a political party, legislative leadership committee, candidate committee of a candidate for, or holder of, a State elective office, or any continuing political committee. A business entity contracting with a county, municipality, independent authority, other than an independent authority that is a State agency, board of education, or fire district shall disclose contributions to: any State, county, or municipal committee of a political party; any legislative leadership committee; or any candidate committee of a candidate for, or holder of, an elective office of that public entity, 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, or any continuing political committee.

The provisions of this section shall not apply to a contract when a public emergency requires the immediate delivery of goods or services.

b. When a 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. When a business entity is other than a natural person, a contribution by any person or other business entity having an interest therein shall be deemed to be a contribution by the business entity. When a business entity is other than a natural person, a contribution by: all principals, partners, officers, or directors of the business entity or their spouses; any subsidiaries directly or indirectly controlled by the business entity; or any political organization organized under section 527 of the Internal Revenue Code that is directly or indirectly controlled by the business entity; other than a candidate committee, election fund, or political party committee, shall be deemed to be a contribution by the business entity.

c. As used in this section:
"business entity" means a natural or legal person, business corporation, professional services corporation, limited liability company, partnership, limited partnership, business trust, association or any other legal commercial entity organized under the laws of this State or of any other state or foreign jurisdiction;

"interest" means the 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, as appropriate; and
"State agency" means any of the principal departments in the Executive Branch of the State Government, and any division, board, bureau, office, commission or other instrumentality within or created by such department, the Legislature of the State and any office, board, bureau or commission within or created by the Legislative Branch, and any independent State authority, commission, instrumentality or agency.

d. Any business entity that fails to comply with the provisions of this section shall be subject to a fine imposed by the New Jersey Election Law Enforcement Commission in an amount to be determined by the commission which may be based upon the amount that the business entity failed to report.

19:44A-20.13 3. a. Any business entity making a contribution of money or any other thing of value, including an in-kind contribution, or pledge to make a contribution of any kind to a candidate for or the holder of any public office having ultimate responsibility for the awarding of public contracts, or to a political party committee, legislative leadership committee, political committee or continuing political committee, which has received in any calendar year $50,000 or more in the aggregate through agreements or contracts with a public entity, shall file an annual disclosure statement with the New Jersey Election Law Enforcement Commission, established pursuant to section 5 of P.L.1973, c.83 (C.19:44A-5), setting forth all such contributions made by the business entity during the 12 months prior to the reporting deadline.

b. The commission shall prescribe forms and procedures for the reporting required in subsection a. of this section which shall include, but not be limited to:

(1) the name and mailing address of the business entity making the contribution, and the amount contributed during the 12 months prior to the reporting deadline;

(2) the name of the candidate for or the holder of any public office having ultimate responsibility for the awarding of public contracts, candidate committee, joint candidates committee, political party committee, legislative leadership committee, political committee or continuing political committee receiving the contribution; and

(3) the amount of money the business entity received from the public entity through contract or agreement, the dates, and information identifying each contract or agreement and describing the goods, services or equipment provided or property sold.

c. The commission shall maintain a list of such reports for public inspection both at its office and through its Internet site.

d. When a 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. When a business entity is other than a natural person, a contribution by any person or other business entity having an interest therein shall be deemed to be a contribution by the business entity. When a business entity is other than a natural person, a contribution by: all principals, partners, officers, or directors of the business entity, or their spouses; any subsidiaries directly or indirectly controlled by the business entity; or any political organization organized under section 527 of the Internal Revenue Code that is directly or indirectly controlled by the business entity, other than a candidate committee, election fund, or political party committee, shall be deemed to be a contribution by the business entity.

As used in this section:
"business entity" means a natural or legal person, business corporation, professional services corporation, limited liability company, partnership, limited partnership, business trust, association or any other legal commercial entity organized under the laws of this State or of any other state or foreign jurisdiction; and

"interest" means the 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, as appropriate.

e. Any business entity that fails to comply with the provisions of this section shall be subject to a fine imposed by the New Jersey Election Law Enforcement Commission in an amount to be determined by the commission which may be based upon the amount that the business entity failed to report.

4. This act shall take effect immediately.

* Note: Bold italicized statutory references of new sections are anticipated and not final as of the time this document was prepared. Statutory compilations of N.J.S.A. 18A:18A-51 is anticipated to show a reference to N.J.S.A. 40A:11-51 and to N.J.S.A.19:44A-20.26.
**List of Agencies with Elected Officials Required for Political Contribution Disclosure**  
**N.J.S.A. 19:44-20.26**

**County Name:** Middlesex

**State:** Governor, and Legislative Leadership Committees  
**Legislative District Nos:** 13, 14, 17, 18, 19, 22  
State Senator and two members of the General Assembly per district.

**County:** Freeholders  
**County Clerk**  
**Sheriff**  
**Surrogate**

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

<table>
<thead>
<tr>
<th>Carteret Borough</th>
<th>Middlesex Borough</th>
<th>Sayreville Borough</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cranbury Township</td>
<td>Milltown Borough</td>
<td>South Amboy City</td>
</tr>
<tr>
<td>Dunellen Borough</td>
<td>Monroe Township</td>
<td>South Plainfield Borough</td>
</tr>
<tr>
<td>East Brunswick Township</td>
<td>New Brunswick City</td>
<td>South Brunswick Township</td>
</tr>
<tr>
<td>Edison Township</td>
<td>North Brunswick Township</td>
<td>South River Borough</td>
</tr>
<tr>
<td>Helmetta Borough</td>
<td>Old Bridge Township</td>
<td>South River Borough</td>
</tr>
<tr>
<td>Highland Park Borough</td>
<td>Perth Amboy City</td>
<td>South Windsor-Waterboro</td>
</tr>
<tr>
<td>Jamesburg Borough</td>
<td>Piscataway Township</td>
<td>South Windsor-Waterboro</td>
</tr>
<tr>
<td>Metuchen Borough</td>
<td>Plainsboro Township</td>
<td>South Windsor-Waterboro</td>
</tr>
</tbody>
</table>

**Boards of Education (Members of the Board):**

<table>
<thead>
<tr>
<th>Carteret Borough</th>
<th>Metuchen Borough</th>
<th>Sayreville Borough</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cranbury Township</td>
<td>Middlesex Borough</td>
<td>South Amboy City</td>
</tr>
<tr>
<td>Dunellen Borough</td>
<td>Milltown Borough</td>
<td>South Plainfield Borough</td>
</tr>
<tr>
<td>East Brunswick Township</td>
<td>Monroe Township</td>
<td>South River Borough</td>
</tr>
<tr>
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<td>North Brunswick Township</td>
<td>South River Borough</td>
</tr>
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<td>Helmetta Borough</td>
<td>Old Bridge Township</td>
<td>South River Borough</td>
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<td>Highland Park Borough</td>
<td>Perth Amboy City</td>
<td>South Windsor-Waterboro</td>
</tr>
<tr>
<td>Jamesburg Borough</td>
<td>Piscataway Township</td>
<td>South Windsor-Waterboro</td>
</tr>
<tr>
<td></td>
<td></td>
<td>West Windsor-Plainsboro Regional</td>
</tr>
</tbody>
</table>

**Fire Districts (Board of Fire Commissioners):**

<table>
<thead>
<tr>
<th>East Brunswick Township Fire District No. 1</th>
<th>Plainsboro Township Fire District No. 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>East Brunswick Township Fire District No. 2</td>
<td>South Brunswick Township Fire District No. 1</td>
</tr>
<tr>
<td>East Brunswick Township Fire District No. 3</td>
<td>South Brunswick Township Fire District No. 2</td>
</tr>
<tr>
<td>Jamesburg Borough Fire District No. 1</td>
<td>South Brunswick Township Fire District No. 3</td>
</tr>
<tr>
<td>Monroe Township Fire District No. 1</td>
<td>Woodbridge Township Fire District No. 1</td>
</tr>
<tr>
<td>Monroe Township Fire District No. 2</td>
<td>Woodbridge Township Fire District No. 2</td>
</tr>
<tr>
<td>Monroe Township Fire District No. 3</td>
<td>Woodbridge Township Fire District No. 3</td>
</tr>
<tr>
<td>Old Bridge Township Fire District No. 1</td>
<td>Woodbridge Township Fire District No. 4</td>
</tr>
<tr>
<td>Old Bridge Township Fire District No. 2</td>
<td>Woodbridge Township Fire District No. 5</td>
</tr>
<tr>
<td>Old Bridge Township Fire District No. 3</td>
<td>Woodbridge Township Fire District No. 6</td>
</tr>
<tr>
<td>Old Bridge Township Fire District No. 4</td>
<td>Woodbridge Township Fire District No. 7</td>
</tr>
<tr>
<td>Piscataway Township Fire District No. 1</td>
<td>Woodbridge Township Fire District No. 8</td>
</tr>
<tr>
<td>Piscataway Township Fire District No. 2</td>
<td>Woodbridge Township Fire District No. 9</td>
</tr>
<tr>
<td>Piscataway Township Fire District No. 3</td>
<td>Woodbridge Township Fire District No. 10</td>
</tr>
<tr>
<td>Piscataway Township Fire District No. 4</td>
<td>Woodbridge Township Fire District No. 11</td>
</tr>
</tbody>
</table>
EQUIPMENT CERTIFICATION

The undersigned Bidder hereby certifies as follows:

1. The number and type of (Type of Equipment or Vehicle, etc.) intended to be used to fulfill all requirements of the Contract Documents with respect to the (Scope of Work/Services) are listed Table 1 and 2 and attached hereto.

   Note: If the Bidder owns or controls all the necessary equipment required, complete Paragraph 2 below. If the Bidder does not own or control all the necessary equipment required, complete Paragraph 3 below.

2. The bidder owns or controls all the necessary equipment show in Table 1 and required to accomplish the work described in the Contract Documents during the Contract Term.

Name of Bidder: __________________ By: __________________

(Signature)

Name: __________________ Title: __________________

3. The Bidder does not own or control all the necessary equipment required to accomplish the Work described in the Contract Documents during the contract Term. The equipment actually owned or controlled by the Bidder is identified in Table 1.

   The remaining equipment required to perform the Work described is noted in Table 2 together with the certification of the owner or person in control of such equipment.

Name of Bidder: __________________ By: __________________

(Signature)

Name: __________________ Title: __________________
TABLE 1
LIST OF EQUIPMENT
OWNED OR CONTROLLED BY BIDDER

<table>
<thead>
<tr>
<th>Type of Equipment (Vehicle, Pump, Etc.)</th>
<th>Number</th>
<th>Make</th>
<th>Equipment Model</th>
<th>Age</th>
</tr>
</thead>
</table>

(Attach additional sheets if necessary)
TABLE 2

CERTIFICATION OF OWNER OR CONTROLLER OF EQUIPMENT NOT OWNED OR CONTROLLED BY BIDDER

This is to certify that I, the undersigned, own or control the equipment required and noted below and definitively grant the Bidder named below the control of said equipment during such time as may be required for that portion of the Work described in the Contract Documents for which said equipment is necessary for the term of the contract.

(Name of Bidder)  (Name of Owner or Controller)

Name of Bidder: ________________________

By: ________________________
    (Signature)

Name: ________________________

Title: ________________________

<table>
<thead>
<tr>
<th>Type of Equipment</th>
<th>Number</th>
<th>Make</th>
<th>Equipment Model</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Vehicle, Pump, Etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(Attach additional sheets if necessary)
Request for Taxpayer Identification Number and Certification

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

2 Business name/disregarded entity name, if different from above.

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.
   - Individual sole proprietor or single-member LLC
   - C Corporation
   - S Corporation
   - Partnership
   - Trust/estate
   - Limited liability company. Enter the tax classification (C = C CORPORATION, S = S CORPORATION, P = PARTNERSHIP).

   Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

4 Exemptions (codes apply only to certain entities; see instructions on page 3): Exempt payee code (if any)

   Exemption from FATCA reporting code (if any)

   (Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions. Requester's name and address (optional)

6 City, state, and ZIP code

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see How to get a TIN, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see What Name and Number To Give the Requester for guidelines on whose number to enter.

Social security number

or

Employer identification number

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here

Signature of U.S. person

Date

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1098 (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1088 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.
By signing the filled-out form, you:
1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. Certify that FATCA code(s) enter here on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See What is FATCA reporting, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:
• An individual who is a U.S. citizen or U.S. resident alien;
• A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
• An estate (other than a foreign estate), or
• A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to pay withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing his U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States:
• In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
• In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
• In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has been elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515, Withholding of Tax on Nonresident Aliens and Foreign Entities).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a “saving clause.” Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items:
1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:
1. You do not furnish your TIN to the requester,
2. You do not certify your TIN when required (see the instructions for Part II for details),
3. The IRS tells the requester that you furnished an incorrect TIN,
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or
5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See Exempt payee code, later, and the separate instructions for the Requester of Form W-9 for more information.

Also see Special rules for partnerships, earlier.

What is FATCA Reporting?
The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are U.S. person. Certain payees are exempt from FATCA reporting. See Exemption from FATCA reporting code, later, and the instructions for the Requester of Form W-9 for more information.

Updating your Information
You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a U.S. corporation that elects to be a non-U.S. corporation, or if you no longer tend to pay tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

Penalties
Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of $50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a $500 penalty.
Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1
You must enter one of the following on this line; do not leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the account holder whose number you entered in Part II of Form W-9, if you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

a. Individual. Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note: ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filled with your application.

b. Sole proprietor or single-member LLC. Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or “doing business as” (DBA) name on line 2.

c. Partnership, LLC that is not a single-member LLC, C corporation, or S corporation. Enter the entity’s name as shown on the entity’s tax return on line 1 and any business, trade, or DBA name on line 2.

d. Other entities. Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the chart or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. Disregarded entity. For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a “disregarded entity.” See Regulations section 301.7701-2(c)(2)(iii). Enter the owner’s name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return or on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner’s name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity’s name on line 2, “Business name/disregarded entity name.” If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2
If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

Line 3
Check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

<table>
<thead>
<tr>
<th>IF the entity/person on line 1 is a(n)</th>
<th>THEN check the box for . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporation</td>
<td>Corporation</td>
</tr>
<tr>
<td>Individual</td>
<td>Individual/sole proprietor or single-member LLC</td>
</tr>
<tr>
<td>Sole proprietorship, or</td>
<td></td>
</tr>
<tr>
<td>Single-member limited liability</td>
<td></td>
</tr>
<tr>
<td>company (LLC) owned by an individual and disregarded for U.S. federal tax purposes.</td>
<td></td>
</tr>
<tr>
<td>LLC treated as a partnership for U.S. federal tax purposes,</td>
<td>Limited liability company and enter the appropriate tax classification.</td>
</tr>
<tr>
<td>LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or</td>
<td>(P= Partnership; C= C corporation; or S= S corporation)</td>
</tr>
<tr>
<td>LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes.</td>
<td></td>
</tr>
</tbody>
</table>

Line 4, Exemptions
If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.
• Generally, individuals (including sole proprietors) are not exempt from backup withholding.
• Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
• Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
• Corporations are not exempt from backup withholding with respect to attorneys’ fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

1. An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2).
2. The United States or any of its agencies or instrumentalities.
3. A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities.
4. A foreign government or any of its political subdivisions, agencies, or instrumentalities.
5. A corporation.
6. A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession.
7. A futures commission merchant registered with the Commodity Futures Trading Commission.
8. A real estate investment trust.
9. An entity registered at all times during the tax year under the Investment Company Act of 1940.
10. A common trust fund operated by a bank under section 584(a).
11. A financial institution.
12. A middleman known in the investment community as a nominee or custodian.
13. A trust exempt from tax under section 664 or described in section 4947.
The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

<table>
<thead>
<tr>
<th>IF the payment is for ...</th>
<th>THEN the payment is exempt for ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interest and dividend payments</td>
<td>All exempt payees except for 7</td>
</tr>
<tr>
<td>Broker transactions</td>
<td>Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.</td>
</tr>
<tr>
<td>Barter exchange transactions and patronage dividends</td>
<td>Exempt payees 1 through 4</td>
</tr>
<tr>
<td>Payments over $600 required to be reported and direct sales over $5,000</td>
<td>Generally, exempt payees 1 through 5</td>
</tr>
<tr>
<td>Payments made in settlement of payment card or third party network transactions</td>
<td>Exempt payees 1 through 4</td>
</tr>
</tbody>
</table>

1 See Form 1099-MISC, Miscellaneous Income, and its instructions.
2 However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid for by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with “Not Applicable” (or any similar indication) written or printed on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(57)
B—The United States or any of its agencies or Instrumentalities
C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)
E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)
F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state
G—A real estate investment trust
H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940
I—A common trust fund as defined in section 584(a)
J—A bank as defined in section 581
K—A broker
L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5
Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6
Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)
Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see How to get a TIN below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner’s SSN (or EIN, if the owner has one). Do not enter the disregarded entity’s EIN. If the LLC is classified as a corporation or partnership, enter the entity’s EIN.

Note: See What Name and Number To Give The Requester, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.ssa.gov. You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/Businesses and clicking on Employer Identification Number (EIN) under Starting a Business. Go to www.irs.gov/forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/Form62 to place an order and have Form W-7 and/or SS-4 mailed to you within 10 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write “Applied For” in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering “Applied For” means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification
To establish the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if items 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see Exempt payee code, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.
1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requestor's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

### What Name and Number To Give the Requester

<table>
<thead>
<tr>
<th>For this type of account:</th>
<th>Give name and SSN of:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Individual</td>
<td>The Individual</td>
</tr>
<tr>
<td>2. Two or more individuals (joint account) other than an account maintained by an FFI</td>
<td>The actual owner of the account or, if combined funds, the first individual on the account</td>
</tr>
<tr>
<td>3. Two or more U.S. persons (joint account maintained by an FFI)</td>
<td>Each holder of the account</td>
</tr>
<tr>
<td>4. Custodial account of a minor (Uniform Gift to Minors Act)</td>
<td>The minor</td>
</tr>
<tr>
<td>5. The usual revocable savings trust (grantor is also trustee)</td>
<td>The grantor-trustee</td>
</tr>
<tr>
<td>6. So-called trust account that is not a legal or valid trust under state law</td>
<td>The actual owner</td>
</tr>
<tr>
<td>7. Sole proprietorship or disregarded entity owned by an individual</td>
<td>The owner</td>
</tr>
<tr>
<td>8. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2))</td>
<td>The grantor</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>For this type of account:</th>
<th>Give name and EIN of:</th>
</tr>
</thead>
<tbody>
<tr>
<td>9. A valid trust, estate, or pension trust</td>
<td>The owner</td>
</tr>
<tr>
<td>10. Corporation or LLC electing corporate status on Form 8832 or Form 2553</td>
<td>Legal entity</td>
</tr>
<tr>
<td>11. Association, club, religious, charitable, educational, or other tax-exempt organization</td>
<td>The corporation</td>
</tr>
<tr>
<td>12. Partnership or multi-member LLC</td>
<td>The organization</td>
</tr>
<tr>
<td>13. A broker or registered nominee</td>
<td>The partnership</td>
</tr>
</tbody>
</table>

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**Secure Your Tax Records From Identity Theft**

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN.
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4776 or TTY/TDD 1-800-829-4059.

**Protect yourself from suspicious emails or phishing schemes.** Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.
The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Visit www.irs.gov/IdentityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancelation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.