

# **REQUEST FOR QUALIFICATIONS**

**Old Bridge Municipal Utilities Authority**  
**Criteria for Submission of Qualifications for Professional Services of**  
**AUDITOR, SPECIAL ACCOUNTANT,**  
**FINANCIAL ADVISOR, ACTUARIAL,**  
**TRAINING SPECIALIST, AND**  
**INSURANCE AGENT**

## **Under the Fair and Open Process**

NOTICE IS HEREBY GIVEN, for all applicants in positions set forth more fully in a notice of publication authorized by the Old Bridge Municipal Utilities Authority by Resolution dated November 18, 2024, for submission of qualifications that shall take into consideration the following factors which will be weighed by the Old Bridge Municipal Utilities Authority as the basis of an award for professional services most advantageous to the Authority:

Submit a resume and letter of application for the professional position ( *naming the position as, Auditor, Actuarial, Financial Advisor, Training Specialist, Insurance Agent for Property & Casualty or Insurance Agent for Health Insurance* ) including all documentation that shall include, at a MINIMUM the following:

- a) Provide full name and business address, and location of any local offices.
- b) Any professional licenses held by the applicant in the State of New Jersey, or any other State, including a "Certificate of Good Standing: or other documents evidencing that the license is not presently suspended or revoked.
- c) List any professional affiliations or membership in any professional societies or organizations, including any offices or honors held.
- d) Provide the number of licensed professionals employed by, or associated with, the Applicant.
- e) List all (college and/or graduate degrees) held by the Applicant and any associated professionals in the business entity.
- f) Provide the name and qualifications of the individuals who will perform the tasks and the amount of their respective participation.
- g) Fully describe the Applicant's experience and knowledge of Old Bridge Municipal Utilities Authority operations.

- h) Fully describe the Applicant's ability to perform the tasks in a timely fashion, including staffing.
- i) List recent, current and projected workload of the Applicant.
- j) List all municipalities for whom the Applicant has had a contractual relationship either currently or previously, including the dates of service.
- k) Provide references in general and from entities where the Applicant has provided similar services as sought by the Old Bridge Municipal Utilities Authority.
- l) Provide a copy of your Business Registration Certificate.
- m) Provide a copy of the Mandatory Affirmative Action Language and a copy of your Certificate of Employee Information Report.
- n) Provide a copy of the Applicant's 2025 Rate Schedule, including employees and associates.

Submit **TWO COPIES** of materials in a sealed envelope with the name of the professional service and the word "CONFIDENTIAL" clearly marked on the outside of the envelope and addressed to:

Old Bridge Municipal Utilities Authority, 71 Boulevard West, Cliffwood Beach, NJ 07735,  
To the Attention of: Michael A. Roy, Executive Director to be received on or before 2:00 PM on  
Wednesday January 22, 2025.

The Old Bridge Municipal Utilities Authority shall award a contract to the firm or firms that best meet the needs and interests of the Authority.

Contracts subject to the fair and open process delineated herein are subject to additional requirements, and any other applicable laws including, but not limited to, the Local Public Contracts Law.