



ANNE ARUNDEL
COUNTY PUBLIC SCHOOLS

2644 Riva Road, Annapolis, MD 21401 | 410-222-5000 • 410-222-5500 (TDD) | www.aacps.org

August 22, 2024

Johanna Lopez, Bid Analyst
Lakeshore Learning Materials, LLC
2695 E. Dominguez Street
Carson, CA 90895
biddept@lakeshorelearning.com

Reference: Anne Arundel County Public Schools Solicitation #25CM-002, Materials of Instruction – Catalog Discount Program

Dear Johanna Lopez:

The Board of Education of Anne Arundel County approved your contract with Anne Arundel County Public Schools for the Catalog Discount Program. A copy of the fully-executed contract is attached. If you have any questions regarding the contract, please contact Julie Hale at 410-222-5165, or via email jhale@aacps.org

AACPS looks forward to working with your company.

Sincerely,

Mary Jo Childs
Director of Purchasing

MJC/jc
cc: Julie Hale

ANNE ARUNDEL COUNTY PUBLIC SCHOOLS (AACPS)
PURCHASING OFFICE
2644 RIVA ROAD
ANNAPOLIS, MARYLAND 21401



Request for Bid #25CM-002

Title: MATERIALS OF INSTRUCTION CATALOG DISCOUNT PROGRAM

Issued: Tuesday, July 2, 2024 Buyer: Julie Hale, CPPB, Senior Buyer Specialist jhale@aacps.org

Bid Due Date: Tuesday, July 23, 2024, at 2:00 pm EDT in the Purchasing Office.

The opening is public and will be conducted in the Bid Room at the above address. If the Central Office Building (address above) is closed due to inclement weather, bids shall be due on the next business day that the building is open. The bid opening time remains the same regardless of the opening day. Call 410-222-5000 to determine if the building is closed. The closing of schools does not always constitute the closing of the Central Office Building.

Minority and Small Business Enterprises and Veteran-Owned Businesses are encouraged to respond to this RFB.

This bid must be signed by a bidder authorized to make a binding commitment for the firm submitting the bid. By submitting a bid in response to this RFB, the bidder selected for award agrees that it shall comply with all federal, State, and local laws, and AACPS policies and regulations applicable to its activities under the resulting contract. Any bidder selected for an award, including businesses outside of the State, must comply with registration/verification requirements of the Maryland Department of Assessments and Taxation. www.dat.maryland.gov

Your signature on this page provides AACPS with your acknowledgment and acceptance of the terms and conditions contained in the Request for Bids. When this page is executed by an authorized officer of Anne Arundel County Public Schools, these specifications, terms and general conditions, and price bid shall become a legally binding contract between the successful bidder and AACPS.

Name of Bidder: Lakeshore Learning Materials, LLC

Address: 2695 E. Dominguez Street, Carson, CA 90895

Phone: (800) 421-5354 Web Address: www.LakeshoreLearning.com Email: biddept@lakeshorelearning.com

Federal ID or Social Security Number: _____ MD Dept. of Assess. & Taxation # Z22358964

MDOT MBE Certification #, if any N/A DGS Small Business Registration #, if any: N/A

Date Bid Submitted: 7/18/2024 Signature of Bidder: Johanna Lopez

Printed Name and Title: Johanna Lopez, Bid Analyst

Accepted by AACPS Director of Purchasing [Signature] 8/21/24
(Date)

Award Limitations:

10% Catalog Discount

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Section I: GENERAL INFORMATION

1. GENERAL

The Board of Education of Anne Arundel County, also referred to as Anne Arundel County Public Schools or AACPS, is soliciting competitive sealed bids for a Materials of Instruction Catalog Discount Program as more fully described herein.

The schedule of the bidding process is as follows:

Issuance of RFB	Tuesday, July 2, 2024
Questions to AACPS Buyer	No later than Thursday, July 11, 2024, at Noon EDT
Bids are due to AACPS Purchasing Office	Tuesday, July 23, 2024, at 2:00 pm Eastern Time
Anticipated award	On or about August 22, 2024

Bidders are responsible for reviewing and understanding this solicitation. To that end, prospective bidders may submit questions to the AACPS Buyer named above.

- Questions must be in writing and submitted via hard copy or email.
- Questions received after the above date will be answered only if time permits.
- The Buyer will distribute a written summary of responses to timely-received questions to all prospective bidders known to have received a copy of this RFB.
- A Bidder who has received this document should immediately visit the AACPS website (<http://bids.aacps.org/>) and register as a plan holder for this Bid. This will ensure that the bidder is notified of any addenda, additional materials, or other communications related to this RFB.
- Oral communications are not binding.

2. NO OBLIGATION

This solicitation implies no obligation on the part of AACPS.

3. COMPETITIVE SEALED BID PROCESS

- Bidders shall submit all requirements outlined in the RFB.
- A bidder may not offer more than one price on each line item.
- The buyer will review each bid submission for responsiveness. If the bid is determined to be *not responsive* or the bidder *not responsible*, the bid will be rejected, and the bidder notified in writing accordingly.
- AACPS may award contract(s) based on groups, individual line items, lots, or any combination thereof, at the sole option of the AACPS.
- Recommendation for award will be made to the responsible bidder(s) submitting the lowest responsive bids(s) and representing the best value to Anne Arundel County Public Schools in accordance with Sect. 5-112 of the Education Article, Maryland Annotated Code.

4. BID SUBMISSION INSTRUCTIONS

- **Bids may be submitted electronically.** Electronic bid submissions must be done through the AACPS website. When submitting an electronic bid, go to www.aacps.org; then click *Vendors &*

Contractors/Bid Information/Current Bid Information/Bid Submissions (in red). The time of receipt is the time the electronic submittal is RECEIVED by Anne Arundel County Public Schools – NOT the time you begin the upload. Please allow additional time for your submission to be fully uploaded. AACPS is not responsible for technical failures that result in a late submission. **The bid must be combined into one PDF file. Do not upload each document separately.**

- Bidders who wish to mail in or drop off their bid shall submit one paper copy, including all attachments, on or before the bid due date and time specified on the title page. Bidders shall also submit one electronic copy of the bid on a flash drive.
- Bids sent for next-day delivery via USPS are delivered to the nearest post office – not the AACPS Central Office. AACPS then retrieves deliveries from the Post Office the next day. Bidders using this USPS shipment method should allow at least one extra business day for delivery to the Central Office.
- Bidders are responsible for properly labeling their bid envelope with the company name, address, bid number, and due date. AACPS is not responsible for a bid that may be inadvertently opened before the bid due date unless it is submitted with proper labeling.
- **E-mailed bids will not be accepted.**
- Bidders may not submit an electronic bid AND a paper bid for the same solicitation. Similarly, bidders may not submit an electronic bid twice on the AACPS online system for the same solicitation. If that happens, a bidder may request to withdraw one of the bids in writing **ONLY IF THE TIME FOR BID SUBMISSION HAS NOT LAPSED**. If the time for bid submission has lapsed and the bidder has not made a written request to withdraw one of the bids, AACPS will reject the second bid submitted, regardless of how it is submitted.
- Any bids received after the date and time specified are considered late and will be rejected on that basis. It is the sole responsibility of the bidder to ensure that their bid is submitted on or before the bid due date and time specified in the solicitation. Late bids will be refused, returned unopened, or destroyed at the bidder's request.

5. REJECTION/CANCELLATION OF RFB

This solicitation is subject to cancellation when determined by the Director of Purchasing to be in the best interest of AACPS. AACPS may reject any or all bids when determined by the Director of Purchasing to be in the best interest of AACPS. Additionally, to ensure fair competition and to permit a determination of the lowest responsive bid from a responsible bidder, AACPS may reject bids that include omissions, alterations of form, or that are conditional or irregular in any respect, or reject non-responsible bidders that show a risk of default.

6. PRICE GUARANTEE

The bidder warrants that the bid price shall be effective for a period of not less than 90 days from the date bids are due in order to give AACPS time to award the contract. NOTE: For the successful bidder, prices shall remain firm over the duration of the contract.

7. EXCEPTIONS

If a bidder takes any exceptions to the terms and conditions of the RFB, a bidder shall notify AACPS in writing not later than ten calendar days (Saturdays and Sundays included) before bids are due. Failure

to take exceptions within the timelines indicated shall be construed by AACPS as full acceptance of the stated terms and conditions.

8. REQUIRED DOCUMENTS

The required documents for this solicitation shall include the signed, original, unaltered solicitation documents including any addenda issued by AACPS, financial statement, completed Qualifications Affidavit, completed Bid Work Sheet, and any other additional documents requested. Failure to do so may result in the rejection of the bid. Acceptable documents for compliance with the Financial Statement requirement include bidder's:

- Latest Balance Sheet and Income Statement prepared by an independent accounting firm;
- Annual Report;
- Dun & Bradstreet complete Business Report; or
- Other financial documents determined to be acceptable by the Director of Purchasing.

9. BID WITHDRAWAL

No bid can be withdrawn after it is submitted to AACPS unless the bidder makes a written request to the buyer, before the bid due date, or if the bidder provides clear and convincing evidence that a mistake in the bid calculation has been made *and only then with the approval of the AACPS Director of Purchasing*.

10. COST OF BIDDING

AACPS does not accept responsibility for any expenses incurred in the bid preparation and presentation requirements, if any. Such expenses are the sole responsibility of the bidder.

11. COOPERATIVE PURCHASING

In accordance with State Finance and Procurement Article, Sect. 13-110, Maryland Annotated Code, AACPS reserves the right to extend the terms of any contract resulting from this bid to public bodies, subdivisions, school districts, community colleges, colleges, and universities including nonpublic schools. The Contractor agrees to notify AACPS of those entities that request to use any contract resulting from this bid and provide usage information to AACPS, if requested.

Anne Arundel County Public Schools assumes no authority, liability, or obligation, on behalf of any other public or non-public entity that may enter into a cooperative agreement associated with the contract resulting from this bid. All purchases and payment transactions will be made directly between the contractor and the requesting entity.

12. PROTESTS

This contract shall be subject to the provision of the Board of Education of Anne Arundel County Policies and Regulation DEC-RA.

13. REGISTRATION

Pursuant to the Corporations and Associations Article of the Annotated Code of Maryland, businesses created in a state other than Maryland may have to register or qualify with the State Department of Assessments and Taxation (SDAT) before doing business in Maryland. Bidders should contact the SDAT directly to determine their registration requirements:

[http://dat.maryland.gov/businesses/Pages/Non-Maryland-\(Foreign\)-Business-Entities.aspx](http://dat.maryland.gov/businesses/Pages/Non-Maryland-(Foreign)-Business-Entities.aspx)

Bidders that are Maryland businesses must be in good standing with the State Department of Assessments and Taxation. Your business status can be verified at

<https://egov.maryland.gov/BusinessExpress/EntitySearch>. Out-of-State bidders must be in

good standing with their home state authority.

Bidders that fail to comply with these requirements may be rejected as not responsible.

14. ANTI-BRIBERY

The Contractor warrants that neither it nor any of its officers, directors, or partners nor any of its employees who are directly involved in obtaining or performing contracts with any public body has been convicted of bribery, attempted bribery or conspiracy to bribe under the laws of any state or of the federal government.

15. TAXES

AACPS is exempt from federal excise taxes [52-73-0144K] and State and local sales or use taxes [3000110-2]. Bidders may not include these taxes in their bid price. If a contractor is required to furnish and install material in the construction or improvement of real property in performance of a contract, the contractor pays Maryland sales tax and exemption does not apply.

16. TOBACCO PRODUCTS

The use of drugs, alcohol, and tobacco products is not permitted on school property. AACPS Board Policy and Regulation GAC-RA and COMAR 13A.02.04 require AACPS to maintain drug, alcohol, and tobacco-free work environments. Failure to comply with this clause is considered a material breach of contract that may result in termination

17. IRREGULARITIES

AACPS reserves the right to waive any minor irregularities in the solicitations or bids. AACPS reserves the right to negotiate or modify any element of the bid to ensure that the best possible arrangements for achieving the stated purpose are obtained.

18. SUBCONTRACTORS

AACPS shall enter into an agreement with the selected Contractor(s) only. The selected Contractor(s) shall be responsible for all services required by this RFB.

19. NON-HIRING OF OFFICIALS AND EMPLOYEES

No official or employee of AACPS whose duties as such official or employee include matters relating to or affecting the subject matter of this contract, shall during the pendency and term of this contract and while serving as an official or employee of AACPS become or be an employee of the contractor or any entity that is a subcontractor on this contract.

20. SEX OFFENDER NOTIFICATION

A. Registered Sex Offender

Maryland Law requires sex offenders to register with the local law enforcement agency in the county in which they will reside, work, or attend school. *See Criminal Procedure Article, §11-707, Annotated Code of Maryland.* An AACPS Contractor may not knowingly employ an individual to work at a school if the individual is a registrant. A Contractor violating this Law is guilty of a misdemeanor and may be subject to imprisonment not exceeding five years or a fine not exceeding \$5,000, or both. *See Section 11-722 of the Criminal Procedure Article, Annotated Code of Maryland.*

B. Other Crimes

An AACPS Contractor or subcontractor may not knowingly assign an employee to work on school premises with direct, unsupervised, and uncontrolled access to children if the employee has been convicted of:

Section 3-307 of the Criminal Law Article, Maryland Annotated Code, *Sexual Offense in the Third Degree*; Section 3-308 of the Criminal Law Article, Maryland Annotated Code, *Sexual Offense in the Fourth Degree*; An offense under the laws of another state that would constitute a violation of Sections 3-307 or 3-308 of the Criminal Law Article if committed in Maryland;
Child sexual abuse under Section 3-602 of the Criminal Law Article, Annotated Code of Maryland;
An offense under the laws of another state that would constitute child sexual abuse under Section 3-602 of the Criminal Law Article if committed in Maryland;
A crime of violence as defined in Section 14-101 of the Criminal Law Article, Annotated Code of Maryland;
or
An offense under the laws of another state that would constitute a crime of violence under Section 14-101 of the Criminal Law Article if committed in Maryland.

See Education Article, §6-113, Annotated Code of Maryland

C. AACPS Contractors shall ensure compliance with the requirements in Sections A and B above for their workforce. Workforce means all of the Contractor's direct employees, subcontractors, and independent Contractors.

D. Violations of any of these provisions may result in immediate termination for cause.

E. Contractor workforce requiring access to any of the AACPS schools located on the secure portion of Fort Meade will require additional background checks conducted by the Installation.

Each Contractor shall screen their workforce to ensure that a Registered Sex Offender does not perform work at a county public school and that a subcontractor and/or independent Contractor conducts screening of its personnel who may work at a school. The term workforce is intended to refer to all the Contractor's direct employees and subcontractors and/or independent contractors it uses to perform the work. Violations of this provision may cause AACPS to take action against the Contractor up to and including termination of the contract.

21. CONTRACTOR SCREENING OF EMPLOYMENT APPLICANTS HAVING DIRECT CONTACT WITH MINORS

In addition to the requirements of Section 20 above, Contractors shall comply with the requirements of Section 6-113.2 of the Education Article, Maryland Annotated Code, regarding screening of applicants for employment.

22. ACCESS TO PUBLIC RECORDS

Bidder should identify those portions of its bid that it considers confidential, proprietary commercial information, or trade secrets, and provide, upon request, justification why such materials, if requested, should not be disclosed by the AACPS under the Maryland Public Information Act. Bidders are advised that the Director of Purchasing may be required to make an independent determination whether the information may be disclosed.

23. GIFTS

In accordance with Board Policy BAF, contractors are notified that the giving or offering a gift or series of gifts to a Board official or employee is improper and may result in disqualification from future work on the grounds that the donor/bidder is no longer a responsible bidder or vendor.

24. eMARYLAND MARKETPLACE ADVANTAGE REGISTRATION

Contractors are required to register on eMaryland Marketplace Advantage at

<https://emma.maryland.gov> within five days following notice of award. Maryland law requires local and state agencies to post award notices on eMaryland Marketplace Advantage. This cannot be done without the contractor's self-registration in the system. Registration is free. Failure to comply with this requirement may be considered grounds for default. It is recommended that any interested bidder register with eMaryland Marketplace Advantage regardless of the award outcome for this procurement as it is a valuable resource for bid notification for municipalities throughout Maryland.

25. TIE BIDS

"Tie bids" mean responsive bids from responsible bidders that are identical in price, terms, and conditions. In the event of a tie bid, an award shall be made to the in-state business if identical favorable bids are received from an in-state and out-of-state bidder.

If both low bids are from in-state businesses, the award may be made to the in-state low bidder that is an MDOT-certified minority business enterprise or State certified small business. If none of the tie-breaking rules apply, a drawing shall be conducted. In addition to the Buyer, an AACPS employee shall also be present to verify the drawing and certify the results on the bid tabulation sheet.

26. CHECKLIST for requirements in your bid response, provided for your convenience:

- a. Return the **entire**, original RFB document, including the title page, bid worksheet, and addenda, if any. If the bid is not electronically submitted, then one paper copy and one electronic copy provided on a flash drive are required.
- b. Qualifications Affidavit
- c. Financial Statement
- d. Completed Electronic Funds Transfer Request Authorization
- e. Completed Acknowledgement of Nepotism Policy
- f. Copy of Bidder's catalog and/or website information

Failure to provide all of the requirements may be cause for the rejection of your bid.

A Bidder who has received this document should immediately visit the AACPS website (<http://bids.aacps.org/>) and register as a Plan Holder for this Bid. This will ensure that the bidder is notified of any addenda, additional materials, or other communications related to this RFB.

Section II: SPECIFICATIONS

1. SCOPE

Anne Arundel County Public Schools, herein called AACPS, is contracting for a catalog discount program for instructional materials.

Materials of Instruction are defined as materials, other than textbooks, essential to the development of skills and content specified in curriculum documents. These basic instructional materials include **but are not limited to**, CDs, DVDs, manipulatives, art supplies, kits, games, books, early childhood furniture and play sets, STEM and/or robotics materials, science supplies, sewing machines, supplies for the centers of applied technology, and other educational teaching tools.

Awards will be considered only for catalogs offering primarily instructional products similar to those currently utilized by AACPS and other participating school entities. The acceptability of the catalog is at the sole discretion of AACPS.

Award notices for the resultant contracts are intended to be shared with, and utilized by, participating member agencies of the Mid-Atlantic Purchasing Team (MAPT). See the attachment included in this bid package.

Participating school districts typically include Anne Arundel County, Baltimore County, Baltimore City, Carroll County, Howard County, and Harford County and may include other school districts/systems, both public and private, within the State of Maryland and throughout the United States.

2. SPECIFICATIONS

- 2.1 AACPS is the lead agency for this RFB. An award may be recommended for any suppliers that meet the standards defined herein. AACPS will not make an award to any supplier that does not provide professional, quality, and aggressive pricing to deliver the products described herein. AACPS reserves the right to entertain submittals for further catalog discounts when it has been determined that said discounts would be beneficial and in the best interest of AACPS.
- 2.2 **CATALOG:** Contractor must produce a catalog, online or on paper, at their own expense that displays and describes the materials of instruction that they have to offer to participating school districts. The catalog should be in color, and provide a picture of the product offered, and a full description of the product offered. Each product offered shall have a product number associated with it and the suggested list price. AACPS does not require a special or separate catalog to be produced.
- 2.3 **INVENTORY:** Contractor must carry a sufficient inventory of all materials of instruction offered in their catalog. Sufficient inventory is hereby defined as delivered within 3-10 calendar days after receipt of a legitimate purchase document such as a purchase order or procurement card.
- 2.4 **DELIVERY:** Contractor must deliver all orders FOB Destination, Freight Included. Deliveries shall be accepted during normal working hours as defined by each participating school district. Inside delivery is required and must not require the assistance of any AACPS staff.
- 2.5 **PRICING:** A discount of at least 10% must be offered for award consideration. Contractor must maintain the discount structure over the duration of the contract.
- 2.6 **SALES REPRESENTATION:** Contractor must have a sales representative assigned to the participating school district. The sales representative must be fully capable of discussing the products in detail that are offered in the contractor's catalog. From time to time, a teacher may

want to see a sample of the product offered and the sales representative must accommodate that request within a reasonable amount of time.

2.7 REPORTS: Upon request, Contractor must produce a usage report by product for each participating school district AND a cumulative usage report for the lead agency, AACPS. The usage report shall provide details of the buying habits of each school in the participating school districts, and the district as a whole.

2.8 AUTOMATION: Contractor must maintain a website and be capable of accepting electronically transmitted orders. The website must minimally display products available in its catalog and provide an online ordering vehicle for use by the participating school districts.

2.9 NEW PRODUCTS/SUPPLIERS: AACPS may, at their discretion, add vendors to this Contract throughout its term. The pricing must be approved by the Director of Purchasing.

3. QUANTITIES

AACPS reserves the right to increase or decrease quantities as required. Quantities are approximate and unit prices bid must apply regardless of any increase or decrease in the estimated quantities shown herein.

4. DURATION OF CONTRACT

Once awarded, the contract will remain in force and effect for a period not to exceed five years from the date of award. Upon completion of this initial term, AACPS reserves the right to rebid or, at its sole option, to extend this contract for up to five, one-year periods.

5. F.O.B. DESTINATION

All contract pricing must include shipping. If shipping costs are not shown separately, the parties agree that shipping costs are included in the total price to the AACPS.

6. FORT GEORGE G. MEADE UNITED STATES ARMY INSTALLATION RESTRICTED ENTRY:

All contractors conducting legitimate business on behalf of Anne Arundel County Public Schools, on the secure portion of the Fort George G. Meade United States Army Installation (Installation), must obtain the necessary access credentials before attempting entry. **NO EXCEPTIONS.**

The following schools are located on the secure portion of the Installation which requires the contractor to obtain the necessary access pass. Access to these schools is through the Reese Road gate inspection station.

Manor View Elementary
Pershing Hill Elementary
West Meade Early Education Center
MacArthur Middle School

Note: Meade High School, Meade Middle School, and Meade Heights Elementary are not located on the secure portion of the Installation and may be visited without an access pass and do not require entry through the Reese Road gate inspection station.

The contractor will need to submit to a background check conducted by the Installation to obtain the needed access pass. To begin this process, contact AACPS, Office of Investigations, Debbie Jones, at dajones2@aacps.org and request a Fort George G. Meade Installation Access Request form (Form 191). If there are any questions call (410) 222-5287. Once the access form is completed and approved by AACPS you will then need to present it, along with the required identification documentation, to the Installation's Dumps Visitor Control Center at:

Demps Visitor Control Center
902 Reece Road
7:30 a.m. to 4:00 p.m., Monday through Friday
(301) 677-1064 or (301) 677-1065

Contractor personnel must submit a Form 191 and present two forms of identification in original form and must be neither expired nor cancelled in order to obtain access (or when necessary an ID badge):

- 1) A State-issued identification card (e.g. driver's license) with picture and Real ID Act 2005 compliant;
- 2) Original social security card (photocopy not acceptable); and
- 3) Original birth certificate or passport as proof of citizenship. Contractor personnel who are not U.S. citizens will be required to provide immigration documentation.

Go to the following link for further information on access requirements:
<https://home.army.mil/meade/index.php/about/visitor-information>

Contractors are responsible for ensuring their employees, subcontractors, and agents have the necessary credentials to access the Installation.

7. CONFIDENTIALITY

Contractor must ensure the complete confidentiality of any and all information provided by AACPS and gathered and developed by Contractor in the performance of this Contract. The material gathered, used and developed must not be provided to any other party without the expressed written approval of the Director of Purchasing.

8. ACCESS TO THE PREMISES

AACPS will provide access to applicable AACPS Locations, Monday through Friday 8 A.M. to 2 P.M. Eastern Time on days AACPS is open for business. Vendors are welcome to visit our website at www.aacps.org for school holidays and other school closings.

9. INSPECTION OF SERVICES AND TESTING OF SUPPLIES AND SERVICES

The Contractor must provide and maintain an inspection system acceptable to the AACPS covering the supplies/services under this solicitation/contract. Complete records of all inspection work performed by the Contractor must be maintained and made available to the AACPS during contract performance and for as long afterward as the contract requires.

10. INSURANCE REQUIREMENTS

Unless otherwise specified in this RFB, the Contractor shall be required to purchase and maintain during the life of the Contract, commercial general liability insurance, business automobile liability insurance, and workers' compensation insurance with limits of not less than those set forth below. The Contractor shall require similar coverage from any of its subcontractors.

Commercial General Liability

At least \$1,000,000 combined single limit coverage written on an occurrence basis covering all premises and operations and including Personal Injury, Independent Contractor, Contractual Liability and Products and Completed Operations. The general aggregate limit is to apply per project. On all Commercial General Liability Insurance policies the Board of Education of Anne Arundel County (the BOARD) AKA Anne Arundel County Public Schools (AACPS) and all AACPS parties, administrators, executives, employees and volunteers shall be named as an additional insured, which shall be shown on the insurance certificates furnished to AACPS under this Section.

Business Automobile Liability Insurance

At least \$1,000,000 Combined Single Limit any one accident to include owned, non-owned, and hired vehicles.

Workers' Compensation Insurance

Statutory benefits as required by Maryland law and/or, when required, the U.S. Longshoremen's and Harbor Workers' Compensation Act including standard Other States coverage; Employers' Liability coverage with limits of at least \$100,000 each accident/\$100,000 each employee disease/\$500,000 disease policy limit.

The Contractor shall provide AACPS with a Certificate of Insurance evidencing the coverage required above within 10 days of the date of the notice of award. While under contract if the Contractor receives an insurer's non-renewal or cancellation notice the Contractor shall send a copy within two business days of its receipt to the AACPS Purchasing Office. The Contractor, if requested by AACPS, shall provide certified true copies of any, or all, insurance policies.

Providing any insurance required herein does not relieve the Contractor of any of the responsibilities or obligations assumed by the Contractor in any resulting Contract or for which the Contractor may be liable by law or otherwise.

Failure to provide and continue in force such insurance as required herein shall be deemed a material breach of any resulting Contract and shall operate as an immediate termination thereof.

11. WAIVER OF SUBROGATION

To the fullest extent permitted by law, the Contractor and its invitees, employees, officials, volunteers, agents and representatives waive any right of recovery against the AACPS Parties, including the Board of Education of Anne Arundel County (the Board), administrators, executives, employees or volunteers for any and all claims, liability, loss, damage, costs or expense (including attorney's fees) arising out of the services provided by Contractor under this Contract. Such waiver shall apply regardless of the cause of origin of the injury, loss or damage, including the negligence of the Board and its elected and appointed officials, officers, volunteers, consultants, agents and employees. The Contractor shall advise its insurers of the foregoing and such insurance shall waive any right of subrogation by endorsement or otherwise.

Section III: MANDATORY TERMS AND CONDITIONS

The following are mandatory terms and conditions to be included in all contracts.

1. COMPLIANCE WITH LAWS

The Contractor hereby affirms:

- A. It is qualified to do business in the State of Maryland and it will take such action as, from time to time hereafter, may be necessary to remain so qualified;
- B. It is not in arrears with respect to the payment of any monies due and owing the State of Maryland, or any department or unit thereof, including but not limited to the payment of taxes and employee benefits, and that it shall not become so in arrears during the term of this Contract;
- C. It shall comply with all federal, State, and local laws, regulations, and ordinances applicable to its activities and obligations under this Contract; and
- D. It shall obtain, at its expense, all licenses, permits, insurance, and governmental approvals, if any, necessary to the performance of its obligations under this Contract

2. RETENTION OF RECORDS

The Contractor shall retain and maintain all records and documents relating to this contract for five (5) years after final payment by the AACPS hereunder or any applicable statute of limitation, whichever is longer, and shall make them available for inspection and audit by authorized representatives of the AACPS, including the Director of Purchasing or the Director of Purchasing's designee, at all reasonable time.

3. TERMINATION

3.1 TERMINATION FOR DEFAULT

Should a Contractor fail to perform fully, faithfully, and promptly any obligation owed to AACPS under this contract, then AACPS may, at its election, consider the breach material and, notwithstanding any requirement of notice, terminate the contract in its entirety. Failure on the part of the Contractor to fulfill contractual obligations shall be considered just cause for termination of the contract, and the Contractor is not entitled to recover any cost incurred by the Contractor up to the date of termination. Such termination, or failure to terminate, by AACPS, shall not be construed as a waiver of any other right or remedy afforded by law or by agreement between the parties which AACPS may have against Contractor. No failure of AACPS to utilize a remedy afforded by law or contract upon any breach by Contractor shall be construed as a waiver of the right to insist upon full, prompt, and faithful performance of the particular obligation, and all other obligations of Contractor in the future.

3.2 TERMINATION FOR CONVENIENCE

The performance of work under this contract may be terminated by AACPS in accordance with this clause in whole, or from time to time in part, whenever AACPS shall determine that such termination is in the best interest of AACPS. AACPS shall pay all reasonable costs associated with the contract that the Contractor has incurred up to the date of termination, and all reasonable costs associated with the termination of the contract; provided, however, that the Contractor shall not be reimbursed for any anticipatory profits that have not been earned as of the date of termination.

3.3 NONAVAILABILITY OF FUNDING

If the County Council fails to appropriate funds or if funds are not otherwise made available for continued performance for any fiscal period of this contract succeeding the first fiscal period, this

contract shall be canceled automatically as of the beginning of the fiscal year for which funds were not appropriated or otherwise made available; provided, however, that this shall not affect either AACPS's rights or the Contractor's rights under any termination clause in this contract. The effect of termination of the contract hereunder shall be to discharge both the Contractor and AACPS from future performance of the contract, but not from their rights and obligations existing at the time of termination.

4. MARYLAND LAW PREVAILS

The law of Maryland shall govern the interpretation and enforcement of this Contract.

5. ASSIGNMENT

Contractor may not assign this contract to successors, associated companies, or any other parties for any reason without written approval of AACPS.

6. PAYMENT

Subject to the performance of the work and its acceptance by the AACPS, contractor may invoice the AACPS for all appropriate charges for services performed during the billing period. All such charges shall be derived in accordance with the prices originally bid on the BID WORKSHEET, found in Section V attached hereto and made a part hereof. In the event that contractor is not in default of any of the contract terms and conditions, then AACPS shall cause said invoice to be timely paid.

Contractor agrees to include on the face of all invoices billed to the AACPS, its Taxpayer Identification Number, which is the Social Security Number for individuals and sole proprietors and the Federal

Employer Identification Number for all other types of organizations, and the purchasing document number; such as the purchase order.

6.1 Payments by EFT

By submitting a response to this solicitation, the Bidder agrees to accept payments by electronic funds transfer, unless the AACPS Director of Purchasing grants an exemption. Unless previously registered, the selected Bidder shall register using the form titled, *Electronic Funds Transfer Request Authorization*, included as an Attachment to this RFB. The original, completed EFT form should be sent to the Buyer.

6.2 Payments by Procurement Card

When appropriate, AACPS reserves the right to use the AACPS procurement card for the payment of supplies or services listed in the Contract in lieu of issuing a purchase order. No procurement card transaction shall take place without the written authorization of the cardholder indicating the order for the supplies or services. The Contractor may process a payment in the credit card network ONLY upon shipment of supplies or performance of the services ordered by the cardholder. For partial shipments or performance, the Contractor may process a payment ONLY for the amount shipped or completed and NOT for the entire amount ordered by the cardholder. Upon shipment or completion of the remaining order, the Contractor may process a payment request to the credit card network for the remainder of the order. ***The Contractor may not charge AACPS for any fees related to the use of the procurement card above their bid prices.***

7. INDEMNIFICATION OF ANNE ARUNDEL COUNTY PUBLIC SCHOOLS

To the fullest extent permitted by law the Contractor shall indemnify and save harmless the AACPS Parties, including its Board of Education, administrators, executives, employees and volunteers, against and from all suits, actions, claims, demands, damages, losses, expenses and/or costs of every kind and description to which the AACPS may be subjected or put, including but not exclusively so, by reason of injury (including death) to persons or damage to property, in any way resulting from Contractor's

performance of the work specified herein or performed under this contract, or any part thereof, or by or on account of any act or omission of the Contractor, its agents or employees, whether such suits, actions, claims, demands, damages, losses, expenses and/or costs be against, suffered or sustained by the AACPS Parties, including its Board of Education, administrators, executives, employees and volunteers, or be against, suffered or sustained by other corporations and persons to whom the AACPS Parties, including its Board of Education, administrators, executives, employees and volunteers, may become liable therefore, except that Contractor shall not indemnify and save harmless the AACPS Parties, including its Board of Education, administrators, executives, employees and volunteers, against and from all suits, actions, claims, demands, damages, losses, expenses and/or costs arising from or due to the negligence of the AACPS Parties, including its Board of Education, administrators, executives, employees and volunteers. The whole, or so much of the moneys due, or to become due the Contractor under the contract, as may be considered necessary by the Director of Purchasing, may be retained by the AACPS until such suits or claims for damages shall have been settled, or otherwise disposed of, and satisfactory evidence to that effect furnished to the Director of Purchasing.

8. CODE OF ETHICS

This solicitation is governed by the Board of Education of Anne Arundel County Vendor Relations Policy DEC and Vendor Relations Administrative Regulation DEC-RA. Also, in accordance with the Board's Ethics and Conflict of Interest Policy BAF, if an AACPS employee has a financial interest in a company, that company may not submit a bid for an AACPS contract.

9. HIRING OF AACPS EMPLOYEES

The Board of Education of Anne Arundel County Policy BAF provides, in part, that an AACPS employee *may not own or have a financial interest in* an entity that has negotiated or entered into a contract with the School System or Board.

The Board Policy can be found in its entirety at <https://aacpsschools.org/boardpolicies/wp-content/uploads/bsk-pdf-manager/2020/12/FINAL-BAF-Ethics-and-Conflict-of-Interest-2019.pdf>

10. DISPUTES

This contract shall be subject to the provision of the Board of Education of Anne Arundel County Policies and Regulation DEC-RA. Pending resolution of a claim, the Contractor shall proceed diligently with the performance of the contract in accordance with the Director of Purchasing's decision

11. REGULATIONS

The policies established by the Board of Education of Anne Arundel County and administration regulations in effect on the date of execution of this Contract are applicable to this Contract.

12. WAIVER

No provision of these Contract Documents shall be deemed to have been waived unless such waiver is in writing. Any waiver shall extend to the particular case only and only in the manner specified and shall not be construed in any way to be a waiver of any further or other rights in the same or different circumstances.

13. NON-DISCRIMINATION CLAUSE

Anne Arundel County Public Schools prohibits discrimination in matters affecting employment or in providing access to programs on the basis of actual or perceived race, color, religion, national origin, sex, age, marital status, sexual orientation, genetic information, gender identity, or disability.

14. MODIFICATIONS AND AMENDMENTS

Modifications to this Contract may be made only with the written agreement of both parties unless an express unilateral right is identified herein.

15. FORCE MAJEURE

Force Majeure is defined as an occurrence beyond the control of the affected party and not avoidable by reason of diligence. It includes the acts of nature, war, riots, strikes, fire, floods, epidemics, pandemics, or other similar occurrences. If either party is delayed by force majeure, said party shall provide written notification to the other within 48 hours. Delays shall cease as soon as practicable and written notification of same is provided. The time of contract completion may be extended by contract modification, for a period of time equal to that delay caused under this condition. AACPS may also consider requests for price increase for raw materials that are directly attributable to the cause of delay. AACPS reserves the right to cancel the contract and/or purchase materials, equipment or services from the best available source during the time of force majeure, and Contractor shall have no recourse against AACPS. Further, except for payment of sums due, neither party shall be liable to the other or deemed in default under this contract, if and to the extent that such party's performance of this contract is prevented by reason of force majeure as defined herein.

16. AACPS EQUIPMENT ISSUED TO CONTRACTOR (if applicable)

Contractor shall be responsible for payment for loss or damage to AACPS equipment issued to contract staff as part of their scope of work. AACPS shall invoice Contractor for lost or damaged AACPS equipment, and payment shall be rendered by Contractor within 30 days of invoice.

The remainder of this page is intentionally blank.

Section IV: BID WORK SHEET

Bidder: Lakeshore Learning Materials, LLC

Bid prices shall be submitted as follows and shall include all costs associated with the performance of this RFB. This includes, but is not limited to salaries/wages, materials, equipment, transportation, overhead, taxes, profit and any other related costs:

NOTE: Amendments to solicitations that may affect pricing often occur before bid opening. It is the bidder's sole responsibility to obtain amendments once they have been posted.

The use of brand names shall be interpreted as follows:

1. Brand names used with the "or equivalent" clause are intended to be descriptive and not restrictive. Bids may be considered on models or brands or products of manufacturers other than those specified provided the documentation and samples required are provided with your response.
2. Brand names that do not use the words "or equivalent" after them are to be considered the only brands acceptable to AACPS.

AACPS retains the sole right to determine when an equivalent is acceptable.

Bid Responses shall be submitted as follows and shall include salaries, expenses, service charges, overhead, shipping, and any other related costs of doing business.

A DISCOUNT OF AT LEAST 10% MUST BE OFFERED FOR AWARD CONSIDERATION.

AACPS anticipates multiple awards based on the various discounts and product offerings submitted by the Respondents.

Catalog Discount Structure with NO minimum order by dollar amount or quantity:

10 % off list

Price Bid Compiled by: Johanna Lopez 7/18/2024
(Signature)

Johanna Lopez

(Print Name of Individual Signing Form)

Section V: DEFINITIONS

- (1) **"Day"**: Calendar day unless otherwise indicated
- (2) **"Equivalent Item"**: An item of equipment, material, or supply, the quality, design, or performance characteristics of which are functionally equal or superior to an item specified in a solicitation.
- (3) **"Responsible Bidder"**: One who is capable financially and competent to complete the job for which he is bidding. A responsible bidder is one who is not only financially responsible, but who is possessed of a judgement, skill, ability, capacity and integrity requisite and necessary to perform a public contract according to its terms.
- (4) **"Responsive Bid"**: A bid submitted in response to a request for bids that conforms in all material respects to the requirements contained in the request for bids.

Section VI: QUALIFICATIONS AFFIDAVIT

Submitted By: Lakeshore Learning Materials, LLC

AACPS reserves the right to contact additional references not contained in the Affidavit. Information obtained from the references provided herein, and any additional references not listed in this Affidavit, will assist AACPS in making the determination on bidder responsibility. If AACPS, in its sole discretion, determines that a bidder's references are inadequate, AACPS reserves the right to determine a bidder is not responsible which may be cause for rejection of the bid.

Bidder shall have at least five years of experience in providing instructional materials and/or furniture, similar in scope and complexity to those described herein. AACPS may consider the experience of the bidder's key personnel toward the experience requirement.

1. How many years has your firm been in the business of providing similar products/services? _____
70 years of relevant experience

2. List at least three contracts/references similar to the work described herein, which your organization has completed within the last 12 months. (Include company names, school district or government agency, address, and contact person and phone number).

A. Date of Substantial Completion: 2023

Project Description: As a vendor-partner in BCPS's \$60 million 2013 Bond Program, Lakeshore annually provides early childhood furniture, learning materials, customized kits, and manipulatives for the District's classroom revitalization, renovation, and replacement projects. On-going sales since 2013.

Address: 200 E. North Avenue, Baltimore, MD 21202

Agency or School District: Baltimore City Public Schools

Contact Person: Crystal L. Francis, Director of Early Childhood

eMail: clfrancis@bcps.k12.md.us Phone Number: (443) 642-4051

Company Name: N/A

Open Punch List: Yes _____ No ✓

Value: \$ Over \$225,000

B. Date of Substantial Completion: 2023

Project Description: Lakeshore annually provides: (1) upgraded early childhood furniture from our Heavy Duty, Kids Colors™, and Flex-Space lines; (2) bespoke kits of learning components and manipulatives to support STEM and summer learning; and (3) replenishment materials across all early childhood classrooms in the district.

Address: 1616 Owens Road, Oxon Hill, MD 2074

Agency or School District: Prince George's County Board of Education

Contact Person: Andreia Searcy, EC Supervisor

eMail: andrea.searcy@pgcps.org Phone Number: (240) 724-1924

Company Name: N/A

Open Punch List: Yes _____ No ✓

Value: \$ 1.5 Million

C. Date of Substantial Completion: 2023

Project Description: Head Start Transition Kits, Consumables Kits. Summer sales are usually around 1,000 to 1,500 kits, varying by year. Summer kits. Customized kits, per customers requirements, labeled boxes "special" or each site, and ahead of scheudle, labeled with stickers on the outside. Coordinated from beginning to end for ease of distrubution.

Address: 440 N. Broad Street, Philadelphia, PA 19130

Agency or School District: Philadelphia School District

Contact Person: Joy Dilljohn, Headstart Director

eMail: jdilljohn@philasd.org Phone Number: (215) 400-5677

Company Name: N/A

Open Punch List: Yes _____ No ✓

Value: \$ Over \$400,000

3. List two additional professional references not including those cited above. Provide project name, address, phone, email, and point of contact.

Project Name	Address	Phone	Email	Point of Contact
Billingsley Elementary School	10069 Billingsley Road, White Plains, MD 20695	(301) 753-2088	srobinson-taylor@ccboe.com	Sabrina Robinson Principal
Delaware-Chenango-Madison-Otsego BOCES	6678 County Rd. 32, Norwich, NY 13815	(607) 334-2771	beth.heinlein@dcmoboces.com	Beth Heinlein, Purchasing Agent

4. What is your Dunn and Bradstreet Rating? IR3

5. How many people does your company presently employ on a:

A. Full-time basis? 2,214

B. Part-time basis? 2,633

6. Has your organization performed any contract for any unit of the State of Maryland or Anne Arundel County Government over the last five years other than those listed in Section 2? (Please list names, addresses, dates and the government employee responsible for accepting the work).

No.

7. Has your company or any of its officers or employees ever been found guilty of any criminal act in regard to the performance of a government contract or subjected to any penalty, termination for cause, or liquidated damages arising out of poor or non-performance? Explain.

Neither Lakeshore or any of its officers or employees ever been found guilty of any criminal act in regard to the performance of a government contract or subjected to any penalty, termination for cause, or liquidated damages arising out of poor or non-performance.

8. Has your company ever been suspended or debarred from bidding on local, school, state, or federal contracts for any reason? Explain.

Lakeshore been not suspended or debarred from bidding on local, school, state, or federal contracts for any reason.

9. Has your company ever filed for bankruptcy/receivership or any other similar defalcation? Are there any tax liens against your company? Explain.

Lakeshore has never filed for bankruptcy/receivership or any other similar defalcation; nor any are any tax liens against Lakeshore.

10. Are any officers or employees of your company also employees of Anne Arundel County Public Schools? Do any officers or employees of your company have immediate family members who are employees of Anne Arundel County Public Schools? Explain.

No Lakeshore officers or employees of your company also employees of Anne Arundel County Public Schools. No Lakeshore officers or employees of your company have immediate family members who are employees of Anne Arundel County Public Schools.

The signatory of this form hereby affirms that the information as set forth is accurate, truthful, and complete, to the best of his/her knowledge and belief.

Dated this 18th day of July 2024.

Name of Organization: Lakeshore Learning Materials, LLC

By: Johanna Lopez (Signature)

Johanna Lopez (Print Name)

Bid Analyst (Title)

**AACPS Accounting Office
Electronic Funds Transfer (EFT) Request Authorization**

Return to: accountingdept@aacps.org

The form can be found at the following link:

<https://tinyurl.com/4w7fu3cu>

BID/PROPOSAL AFFIDAVIT

A. AUTHORITY

I HEREBY AFFIRM THAT:

I, (print name) Johanna Lopez possess the legal authority to make this Affidavit.

B. CERTIFICATION OF REGISTRATION OR QUALIFICATION WITH THE STATE DEPARTMENT OF ASSESSMENTS AND TAXATION

I FURTHER AFFIRM THAT:

The business named above is a (check applicable items):

- (1) Corporation — domestic or foreign;
- (2) Limited Liability Company — ☒ domestic or foreign;
- (3) Partnership — domestic or foreign;
- (4) Statutory Trust — domestic or foreign;
- (5) Sole Proprietorship

and is registered or qualified as required under Maryland Law.

I further affirm that the above business is in good standing both in Maryland and (IF APPLICABLE) in the jurisdiction where it is presently organized, and has filed all of its annual reports, together with filing fees, with the Maryland State Department of Assessments and Taxation. The name and address of its resident agent (IF APPLICABLE) filed with the State Department of Assessments and Taxation is:

Name and Department ID

Number: Z22358964 Address: 2695 E. Dominguez Street, Carson, CA 90895

and that if it does business under a trade name, it has filed a certificate with the State Department of Assessments and Taxation that correctly identifies that true name and address of the principal or owner as:

Name and Department ID Number: N/A

Address: N/A

C. EMPLOYMENT OF SEX OFFENDERS AND OTHER CRIMINAL OFFENDERS

I FURTHER AFFIRM THAT:

I am aware of, and the above business will comply with, the following requirements of Section 11-722 of the Criminal Procedure Article, and Section 6-113 of the Education Article, Annotated Code of Maryland:

- A. Maryland Law requires sex offenders to register with the State and with the local law enforcement agency in the county in which they will reside, work, or attend school. **An AACPS contractor may not knowingly employ an individual to work at a school if the individual is a registrant.** A contractor violating this Law is guilty of a misdemeanor and may be subject to imprisonment not exceeding five years or a fine not exceeding \$5,000, or both.

See Section 11-722 of the Criminal Procedure Article, Annotated Code of Maryland.

- B. An AACPS contractor or subcontractor may not knowingly assign an employee to work on school premises with direct, unsupervised, and uncontrolled access to children, if the employee has been convicted of:

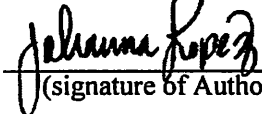
- 1) Section 3-307 of the Criminal Law Article, Maryland Annotated Code, *Sexual Offense in the Third Degree*;
- 2) Section 3-308 of the Criminal Law Article, Maryland Annotated Code, *Sexual Offense in the Fourth Degree*;
- 3) An offense under the laws of another state that would constitute a violation of Sections 3-307 or 3-308 of the Criminal Law Article if committed in Maryland;
- 4) Child sexual abuse under Section 3-602 of the Criminal Law Article, Annotated Code of Maryland;
- 5) An offense under the laws of another state that would constitute child sexual abuse under Section 3-602 of the Criminal Law Article if committed in Maryland;
- 6) A crime of violence as defined in Section 14-101 of the Criminal Law Article, Annotated Code of Maryland; or
- 7) An offense under the laws of another state that would constitute a crime of violence under Section 14-101 of the Criminal Law Article if committed in Maryland.

See Section 6-113 of the Education Article, Annotated Code of Maryland

Violations of any of these provisions may result in immediate termination for cause.

I DO SOLEMNLY DECLARE AND AFFIRM UNDER THE PENALTIES OF PERJURY THAT THE CONTENTS OF THIS AFFIDAVIT ARE TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE, INFORMATION, AND BELIEF.

By: Johanna Lopez (printed)
name of Authorized Representative and affiant)


(signature of Authorized Representative and affiant)

Date: 7/18/2024



Cooperative Rider Clause

The Mid-Atlantic Purchasing Team (MAPT) is the agreement between the Baltimore Metropolitan Council ("BMC") and the Metropolitan Washington Council of Governments ("MWCOCG") to aggregate the public entity and non-profit purchasing volumes in the Maryland, Virginia and Washington, D.C. region ("region").

Format

A lead agency format is used to accomplish this work. The lead agency has included this MAPT Cooperative Rider Clause in this solicitation indicating its willingness to allow other public entities to participate pursuant to the following Terms and Conditions:

1. Terms

- a. Participating entities, through their use of the Cooperative Rider Clause, agree to the terms and conditions of the resulting contract to the extent that they can be reasonably applied to the participating entity.
- b. Participating entities may also negotiate additional terms and conditions specific to their local requirements upon mutual agreement between the parties.

2. Other Conditions - Contract and Reporting

The supplier/contractor and participating entity agree:

- a. The contract resulting from this solicitation shall be governed by and "construed in accordance with the laws of the State/jurisdiction in which the participating entity officially is located;
- b. To provide to BMC and/or MWCOCG contract usage reporting information, including but not limited to quantity, unit pricing and total volume of sales by entity, as well reporting other participating entities added on the contract, on demand and without further approval of contract participants;
- c. Contract obligations rest solely with the participating entities only;
- d. Significant changes in total contract value may result in further negotiations of contract pricing with the lead agency and participating entities.

In pricing and other conditions, vendors are urged to consider the broad reach and appeal of MAPT with public and non-profit entities in this region.

A list of the participating members of the Mid-Atlantic Purchasing Team can be found at the following web links <http://www.baltometro.org/our-work/cooperative-purchasing/brcpc-representatives> and www.mwcog.org/purchasing-and-bids/cooperative-purchasing/member-links/



ANNE ARUNDEL
COUNTY PUBLIC SCHOOLS

2644 Riva Road, Annapolis, MD 21401 | 410-222-5000 · 301-970-8644 (WASH) · 410-222-5500 (TDD) | www.aacps.org

July 8, 2024

TO: All Prospective Respondents

REF: **Anne Arundel County Public Schools (AACPS)**
Request for Bid #25CM-002, Materials of Instruction (MOI) Catalog Discount Program

FROM: Anne Arundel County Public Schools, Julie Hale, Senior Buyer Specialist
2644 Riva Road, Annapolis, MD 21401, jhale@aacps.org

ADDENDUM #1

The Referenced Addendum #1 consists of one (2) pages.

Please be advised of the following changes are being made to the Subject Solicitation:

1. Section II Specifications

2.5 PRICING is replaced with the following:

A discount of *at least 10%* must be offered for award consideration. The discount may not be decreased for the duration of the contract. Contractors shall note the contract number, discount percentage, and discount price on all quotes and invoices.

2. Section III Mandatory Terms and Conditions

6. PAYMENT is replaced with the following:

Subject to the performance of the work and its acceptance by the AACPS, contractor may invoice the AACPS for all appropriate charges for services performed during the billing period. Invoices shall contain the AACPS contract and PO number, the contract discount percentage, and the discount price. All such charges shall be derived in accordance with the prices originally bid on the BID WORKSHEET, found in Section V attached hereto and made a part hereof. If contractor is not in default of any of the contract terms and conditions, then AACPS shall cause said invoice to be timely paid.

In addition to the above, Contractor agrees to include on the face of all invoices billed to the AACPS, its Taxpayer Identification Number, which is the Social Security Number for individuals and sole proprietors and the Federal

Employer Identification Number for all other types of organizations, and the purchasing document number; such as the purchase order.

25CM-002 Materials of Instruction Catalog Discount Program
Addendum #1

Please be advised of the following answers to question submitted for the Subject Solicitation:

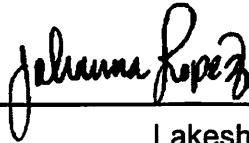
Question #1:

We wanted to confirm the district was accepting proposals from companies that provide educational software when saying "other educational tools".

AACPS Answer #1:

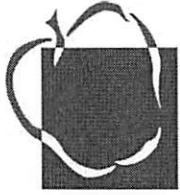
Educational software does qualify as Materials of Instruction (MOI)

These are the only responses contemplated by this Addendum #1. All other Specifications, Terms, and Conditions shall remain as originally stated. **THE COMPLETE ADDENDUM MUST BE RETURNED WITH THE BID SUBMISSION.**



7/18/2024

Lakeshore Learning Materials, LLC



ANNE ARUNDEL
COUNTY PUBLIC SCHOOLS

2644 Riva Road, Annapolis, MD 21401 | 410-222-5000 · 301-970-8644 (WASH) · 410-222-5500 (TDD) | www.aacps.org

July 9, 2024

TO: All Prospective Respondents

REF: **Anne Arundel County Public Schools (AACPS)**
Request for Bid #25CM-002, Materials of Instruction (MOI) Catalog Discount Program

FROM: Anne Arundel County Public Schools, Julie Hale, Senior Buyer Specialist
2644 Riva Road, Annapolis, MD 21401, jhale@aacps.org

ADDENDUM #2

The Referenced Addendum #2 consists of three (3) pages (including attachment).

Please be advised of the following clarification to the Subject RFB:

This bid is not designed for instructional assessments, curriculum-based programs, etc. Portions of your catalogs that contain curriculum-specific materials will not be considered. Anne Arundel County Public Schools procures curriculum materials under separate solicitations.

Be advised of the following *change* to the answer to question addressed in Addendum #1:

Original Question #1:

We wanted to confirm the district was accepting proposals from companies that provide educational software when saying "other educational tools".

Revised AACPS Answer #1:

Although educational software does technically qualify as Materials of Instruction (MOI), this bid is not being driven by curriculum and we will not be considering curriculum-based materials. See above.

Be advised of the following answers to additional questions submitted for the Subject RFB:

Question #1:

Can we provide a discount range, or does it have to be a flat percentage discount? For some manufacturers, we are able to offer much higher discounts off of MSRP than others, and a range would allow us to offer these discounted rates.

AACPS Answer #1:

Yes, you may offer a range of discounts as long as the discounts are *at least* 10%.

25CM-002 Materials of Instruction Catalog Discount Program
Addendum #2

Question #2:

If we provide range, how specific can we be? We are able to offer different discount points within manufacturers depending on the product type/category.

AACPS Answer #2:

You can be specific when offering discounts based on product type/category, but please keep in mind that end users will need to understand the structure to be able to confirm pricing.

Question #3:

Are we able to specify which manufacturers the discounts cover? This differs per manufacturer, and so we would like to make sure exclusions are allowed if there are any.

AACPS Answer #3:

Yes, but again, it needs to be clear to end users. Exclusions should be kept to a very minimum.

Question #4:

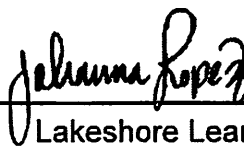
What is the "Completed Acknowledgement of Nepotism Policies" as listed on checklist item 26.e.?

AACPS Answer #4:

This form was inadvertently left off the RFB. The form is attached and is a requirement for all bidders to complete.

These are the only responses contemplated by this Addendum #2. All other Specifications, Terms, and Conditions shall remain as originally stated.

THE COMPLETE ADDENDUM AND THE COMPLETED "ACKNOWLEDGEMENT OF NEPOTISM POLICY" MUST BE RETURNED WITH THE BID SUBMISSION.


7/18/2024
Lakeshore Learning Materials, LLC

**Acknowledgement of Nepotism Policy**

Effective Date of Change

Name (Last)	(First)	(MI)	Employee ID#	Supervisor's Name (if applicable)
Lopez	Johanna	A	N/A	Eunice Peterson
Position			<input type="checkbox"/> Employee <input type="checkbox"/> Board Member <input checked="" type="checkbox"/> Contractor	Location
Bid Analyst				Carson, CA

Please be aware of Board of Education Policy GAF and Administrative Regulation GAF-RA regarding nepotism. To comply with this policy and regulation, you must complete the following:

- ☒ I **do not** have any of the family members defined in #2 or #3 below, or persons living in my household who are employed by Anne Arundel County Public Schools (AACPS)/Board of Education.
(If you select this box, proceed to Signature/Date section)
- The following **immediate family members** (spouse, parent, child, sibling, grandparent, grandchild, aunt, uncle, niece, nephew, mother-in-law, father-in-law, sister-in-law, brother-in-law, son-in-law, daughter-in-law, grandparent-in-law, grandchild-in-law, uncle-in-law, niece-in-law, nephew-in-law, and all step relationships) are employed by AACPS/Board of Education:

Name	Relationship
Position Title	Position Location
Name	Relationship
Position Title	Position Location
Name	Relationship
Position Title	Position Location
Name	Relationship
Position Title	Position Location

- The following **non-relatives** live in my household and are employed by AACPS/Board of Education:

Name	Relationship
Position Title	Position Location
Name	Relationship
Position Title	Position Location

I affirm that the information provided by me on this form is correct to the best of my knowledge. I understand that I am required to complete a new nepotism form should circumstances change and relationships as detailed above develop during my employment with AACPS/Board of Education. I will submit a new form within 30 days in accordance with Administrative Regulation GAF-RA.

Johanna Lopez
Signature

7/18/2014

Date

**Internal
Use Only**Reviewed by: _____
Date Initial☐ Contacted Employee/
Board Member☐ Contract Lead☐ Filed



July 18, 2024

Anne Arundel County Public Schools
Attn: Julie Hale
Purchasing Office
2644 Riva Road
Annapolis, Maryland 21401

RE: RFB #25CM-002 Materials of Instruction - Catalog Discount Program

Dear Julie Hale and Anne Arundel County Public Schools Staff,

Thank you for providing Lakeshore Learning Materials the opportunity to respond to RFB #25CM-002 Materials of Instruction - Catalog Discount Program. Lakeshore is dedicated to creating innovative educational materials and furniture that spark young imaginations, instill a sense of wonder and foster a lifelong love of learning. With materials, furniture and environments for students of all ages, we help each individual reach developmental milestones and achieve education goals—while still having fun!

OFFER

Lakeshore is pleased to present the following offer to Anne Arundel County Public Schools:

- 10% discount on all nonsale items from Lakeshore's catalogs, website (www.LakeshoreLearning.com) and retail stores (see attached Store List for locations).
- FREE shipping on all orders in the contiguous United States.

Must reference "Per RFB #25CM-002" on all purchase orders to receive these terms.

Lakeshore agrees to hold the discount offered in this submission throughout the lifetime of the contract. Catalogs and prices are subject to change during the calendar year, and in the event of significant factors outside our control, such as government-imposed tariffs or global pandemic; for current prices please visit www.LakeshoreLearning.com.



DELIVERY OF GOODS

Lakeshore ships millions of boxes each year, with numerous semi-truckloads leaving our warehouses every day. We contract with leading trucking companies that deliver thousands of truckloads of materials each year to different regions across the country, and that number is growing.

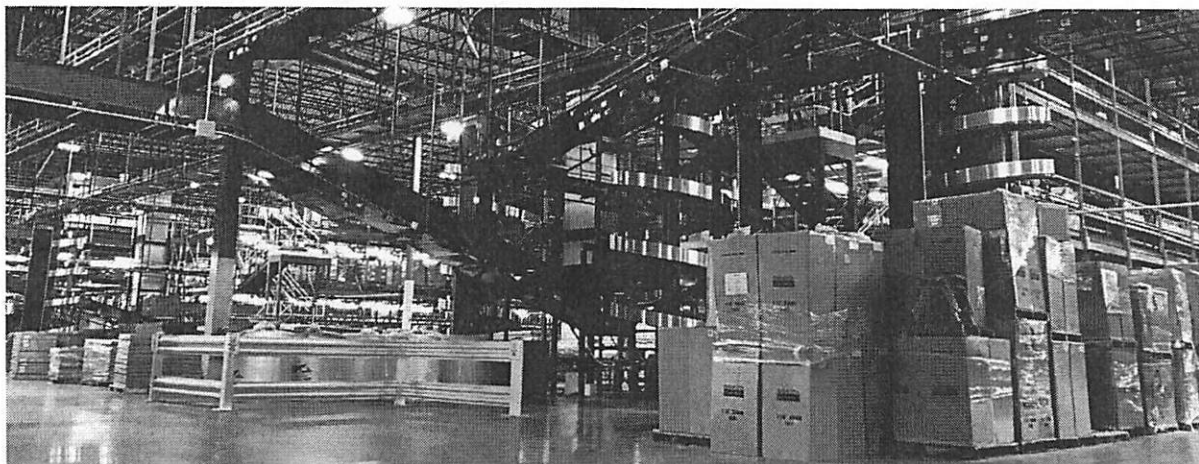
Lakeshore is flexible and can alter delivery and installation schedules if AACPS' schedule changes.

PRODUCT AVAILABILITY AND DELIVERY CAPABILITY

National Distribution Centers for Faster Shipping!

With two national distribution centers and one more on the way, we can provide fast shipping anywhere in the country. And with over 2.4 million square feet of storage capacity, our in-stock rate is among the highest industry-wide!

- No drop shipments—all orders ship direct from Lakeshore
- Simple and hassle-free order tracking
- Custom labeling—so every item is delivered to the right classroom, library, media center or other learning space
- Personalized service from order to delivery



OUR APPROACH TO PRODUCT DEVELOPMENT

At Lakeshore, we develop our products based on recognized, evidence-based best practices. Designed to meet grade-level expectations and to support the achievement of key developmental milestones, Lakeshore products are created by expert educators with years of classroom experience. All products are developed with intentionality and designed to focus on and support principles and practices identified in current research; each product is evaluated for its alignment with the available research as well as for its practical functions in the classroom or other learning space.

In addition to independent laboratory testing, Lakeshore products are both teacher-tested and child-tested to ensure appropriateness, durability and safety. From development to manufacturing, we maintain strict oversight to ensure the quality of our products.

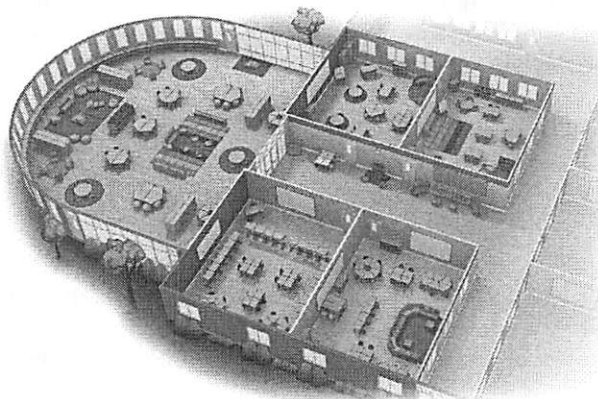
DIRECT MANUFACTURER

With Lakeshore, you're working with a single point of contact from start to finish. As the direct manufacturer of Lakeshore products, we develop a vast majority of the items featured in our catalogs, in our retail stores and on our website. We are not restricted from sales, territories or dealer authorizations. In addition, our products are backed by our ironclad guarantee: If you are unhappy with any item for any reason, return it to us for a full refund or exchange.

We maintain strict control of manufacturing specifications and processes. The fully staffed office near our overseas factories ensures top-quality, virgin raw materials are used. Plus, our in-house mechanical/process engineers regularly inspect and consult with the factories, ensuring manufacturing processes operate effectively, producing consistent, high-quality furniture pieces. In-house inspectors also conduct strict and thorough factory inspections on all orders following manufacturing—before furniture units are shipped and stocked at Lakeshore distribution centers.

CLASSROOM & SCHOOL DESIGN PLANNING

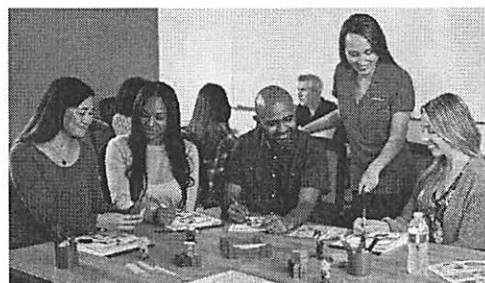
We have extensive experience partnering with site and design advisory teams on large projects. Upon award, our team can meet with advisory boards to visit classrooms, libraries, media centers or other sites to measure, develop and deliver complimentary 3-D classroom layouts. These "scaled" 3-D renderings are available at no additional cost—and feature all furniture, carpet, doors, windows, etc., to ensure appropriate sizing and functionality in each environment.



All classroom and school design services are supported by traditional furniture for preschool to kindergarten and flexible furniture options for preschool to high school settings. All Lakeshore furniture is developed in-house by educators and design engineers who ensure that all units are manufactured for ultimate strength and durability. In addition, our in-house team of mechanical/process engineers assist with the selection of raw materials, ensuring the highest quality and appropriateness for all furniture.

PROFESSIONAL DEVELOPMENT

Lakeshore Professional Services Group (PSG) is proud to offer personalized, hands-on learning services designed to support the unique and growing needs of teachers and educators. As educators themselves, our PSG specialists will partner with you to customize the perfect mix of content and training to support your professional development needs.



In addition, our team will assist you with every step of the process:

- Determine your learning goals
- Assist with your organization's decision-making process
- Create a custom solution specific to your content/training needs
- Plan and lead implementation

Below are just a few of our wide range of standing topics:

- Social-Emotional Development
- Flexible Seating for 21st-Century Classrooms
- Developmentally Appropriate Activities
- Language and Literacy
- Cognitive Development
- STEM/STEAM
- Standards for Mathematical Practice
- Environments
- Instructional Support
- Intervention

Professional Development can be tailored for a variety of audiences, including teachers, administrators and parents. Choose from in-person events, live or recorded virtual sessions, or a combination of both.

ORDER PROCEDURE

When Lakeshore receives a purchase order from Anne Arundel County Public Schools, your dedicated Lakeshore Sales Support Specialist, Brittany Bacote, will contact AACPS to coordinate the logistics of the delivery, such as:

- Delivery dates and locations
- Unloading restrictions
- Stairs/elevator restrictions
- Setup requirements

For any delays in the project schedule, Lakeshore will coordinate to hold orders from shipping at one of our storage facilities (located in Midway, Kentucky, and Carson, California) until AACPS provides confirmation to release orders and schedule deliveries.

PRODUCT WARRANTY

We unconditionally guarantee every item. We stake our reputation on the quality of our products. If you are unhappy with any item for any reason, return it to us for a full refund or exchange.



- **Lifetime warranty** on premium-quality classroom furniture, tables and desks, chairs, and cots
- **10-year warranty** on Classroom Carpets
- **5-year warranty** on Write & Wipe Mobile Tables & Desks, Outdoor Furniture, trikes, and cribs
- All other items receive a full-year warranty (unless otherwise noted)

CUSTOMER SERVICE

We can't say it enough: Customer satisfaction is our number-one priority. As such, our multifaceted Customer Service representatives go out of their way to provide a peak experience for every customer.

Customer Service Center:

Address: Lakeshore Learning Materials - Customer Service Department
2695 E. Dominguez St., Carson, CA 90895
Phone: (800) 428-4414
Fax: (310) 537-4261
E-Mail: lakeshore@lakeshorelearning.com
Hours of Operation: Monday-Friday, 6:00 a.m.-6:00 p.m., PST



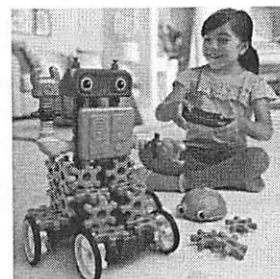
RETURNS OR EXCHANGES

Not only are our products distinguished by their quality, educational merit and safety—they're also backed by our ironclad guarantee. If you are unhappy with any item for any reason, you may return it for a full refund or exchange...no questions asked! If you need assistance with an order, simply contact our Customer Service Department at (800) 428-4414.

EXCLUSIVE ITEMS

Among the wide range of educational products offered by Lakeshore, there are over a thousand outstanding and innovative items for which we are the sole-source vendor. These exclusive materials are easily identified by the prefix in their item number. Any items you see with the following prefixes are sole-source items that you simply won't find anywhere other than Lakeshore:

**AA AB AX AZ DD DG EE FF GG HH JC JJ KC KT LA
LC LCW LDA LK LL LM PP PX RA RE RJ RR RS TT VX WE WF YB**



BRIEF HISTORY

Like many great enterprises, Lakeshore started with one person taking a chance. In 1954, an Omaha homemaker named Ethelyn decided to pack up her family and move to California to open a toy store. The move was a bit unconventional for a woman in 1950s America—but entrepreneurs don't typically follow the status quo. Initially, Ethelyn focused on selling toys to parents, but before long, local schools started calling her for art materials and other classroom supplies. Ethelyn listened to her customers. Sensing an untapped market, she sold the store and started Lakeshore Learning Materials.



Eventually, Ethelyn's sons, Charles and Michael, joined the business—expanding operations and turning Lakeshore into a million-dollar company within just a few years. When Ethelyn retired in 1971, Michael assumed the duties of CEO, while Charles became the Vice President in charge of merchandise and buying. Today, Michael's sons, Bo and Josh, are an integral part of the business as well—having worked their way up from summer jobs in the warehouse to CEO and Chief Product Officer, respectively.

Two generations later, Lakeshore continues to offer the best products and service around—and we're still expanding! In addition to our growing network of over 60 retail stores, we offer multiple mail-order catalogs to meet the needs of parents, teachers and children worldwide. Plus, our full-service website offers instantaneous access to our catalogs as well as free activity ideas, classroom designs for infants through middle school/high school, and much more.



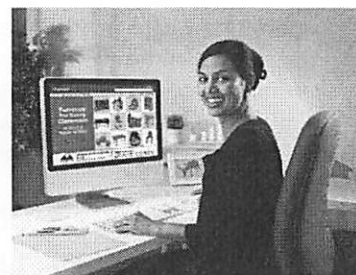
Distribution Center 2: Kentucky

CUSTOM WEBSITES: ePROCUREMENT SERVICES

Lakeshore eProcurement Services helps schools and institutions cut administrative costs, streamline processes and put the entire purchasing cycle at their fingertips.

With over 20,000 enrolled customers, from metropolitan and rural school districts to local early learning programs, custom ePro websites are designed to meet the needs of any organization.

Our custom ePro websites complement any system:
Oracle | SAP | Ariba | Skyward and more!



Over 30 features to choose from:

- Visibility of account terms
- Multilevel approval process (up to 4 levels)
- Instant quotes
- Quick order approval
- One-click bulk orders
- User-specific budgets and expirations shipping/billing rules and views
- Exclusive Items
- Customized product assortment
- Item restrictions and maximum limits on orders
- Easy self-service user administration
- Search function that narrows results quickly and accurately
- Multiple payment options: PO, account, p-card, credit card, gift card, etc.
- Tablet-friendly

AACPS ePRO LOGIN

AACPS has an established eProcurement site with Lakeshore! You can access your custom ePro site by visiting <https://eproservices.lakeshorelearning.com>.

If you'd like to view your website, you'll find a view only link and case-sensitive login information below:

URL: <https://eproservices.lakeshorelearning.com>

Username: annearundel_viewonly

Password: Lakeshore123!

- Click on the link above and sign in with your username and password.
- You can browse through our items by category, age range, or by entering in keywords in *Search* box. If you already know the items that you'd like to view, there is a *Quick Order* link in the upper right of the home page for a fast shortcut.
- Place desired items into your shopping cart to see your total.
- You can either *Print* or *E-Mail* your cart, or you can *Save Cart to a Shopping List* to be able to access it later. Once you name your cart, it will be saved until you delete it.
- You can also *Request a Quote*, and a formal quote will be emailed to you.
- Please do not hesitate to contact Customer Service at (800) 428-4414 if you have any questions & need any assistance with the website. Kindly reference account #7920. We are always happy to help!

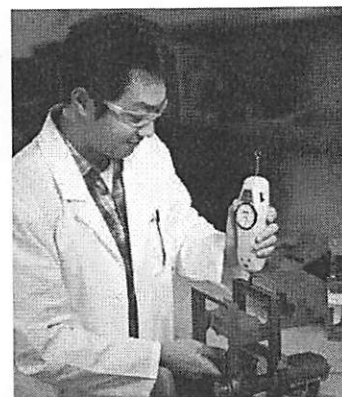
QUALITY & SAFETY

Focus on Safety

At Lakeshore, children's safety is our highest priority—and we know it's the top concern of our customers. That's why we want to provide you with detailed information about Lakeshore's testing and certification process, including the rigorous steps we take to ensure our products are safe.

Not only are we in full compliance with all the current U.S. safety regulations, but we also have our own in-house Product Regulatory & Compliance Team, which tests and inspects every item we carry with even more rigorous standards than those required by law. Every item we sell must meet or exceed all government safety requirements, or we don't carry it.

First, we ensure that all the materials that go into each new product are safe. (For example, materials in all children's products must be phthalate-compliant and must also meet strict standards for lead content.) Once we confirm that the materials we're using are safe, we conduct exhaustive "use and abuse" testing to make sure each product will remain safe through years of everyday use. And after a product passes our rigorous testing, it is then tested and certified by a third-party testing laboratory. Finally, we continue to monitor the safety of our products through periodic testing, both internally and by third-party labs, to ensure that our suppliers maintain the high level of integrity we demand of our materials.



Designed by Educators

All of our exclusive products are designed by credentialed educators with years of real-world classroom experience. As subject-matter experts, they intentionally design Lakeshore products to meet content and performance standards at appropriate ages and abilities. In addition, our product developers utilize the latest research to ensure products remain relevant in a continuously evolving educational environment. Finally, they are involved in every stage of product development as well as the creation of ancillary materials to support implementation.

In-House Engineering

Our product developers are supported by a dedicated team of in-house engineers who ensure the quality and integrity of our designs. They use 3-D printing technology to oversee our designs and maintain strict control over the quality and durability of each product. In addition, just as we source the highest-quality raw materials for our furniture, we only use virgin materials and composites in our manipulatives—avoiding regrind material that can compromise a product's integrity.

Transparency in Manufacturing

Once a design is finalized, we maintain close supervision over the entire manufacturing process. Our manufacturing experts—who possess degrees in mechanical engineering, chemical engineering, process engineering and other related fields—spend all of their time at our production sites. They closely monitor the manufacturing processes and the materials being used to ensure the highest-quality products for our customers. Having our own experts on hand allows us to manufacture our products without the use of third parties.

Our commitment to responsible and ethical business practices extends to everything we do—including our social and community responsibilities. Lakeshore has a strict no-tolerance policy for human rights violations, child labor or other labor law violations; we have a fully staffed Hong Kong office set up for the sole purpose of enforcing that policy and ensuring the highest health and safety standards are met by our vendors. If manufacturing issues arise, we take corrective action by providing additional training and development. Our engineers work closely with the factory's owners and engineers—reinforcing Lean and Six Sigma Manufacturing processes and overseeing the entire production process from start to finish.

EXPERIENCE

Lakeshore has extensive experience working with school districts, early childhood programs (both public and private) and government agencies. Below are a few examples of the types of large orders that we skillfully and conscientiously handle on a regular basis.



Los Angeles Unified School District - Based in Los Angeles, California, the district's Early Childhood and Special Education Department partnered with Lakeshore's Custom Learning Solutions division to develop and deliver more than 24,000 custom backpack kits to support its distance learning goals. Lakeshore also offered customized Professional Development for the dozens of curriculum coaches and teachers involved in the project to ensure each educational professional was comfortable using the resources with fidelity.

Governor's Office of Early Childhood/Kentucky Department of Education - Based in Frankfort, Kentucky, the governor's office reached out to Lakeshore to provide area-specific custom classroom solutions for the entire state. Lakeshore delivered and installed 2,200 programs statewide—all on schedule, and with a total value of more than \$10 million. Each custom classroom solution was designed to meet the specific needs of its intended program and contained a combination of furniture, carpets, and manipulatives. All 2,200 programs were delivered successfully and on time, with no drop shipments.

Mississippi Department of Human Services - Based in Jackson, Mississippi, the Department of Human Services reached out to Lakeshore for support with the state's summer learning programs. Specifically, we collaborated in the development of customized STEAM Project-Based Learning Kits and Hand-On Materials Kits for K-Gr. 2 and Gr. 3-5. The kits and materials were customized to meet specific program objectives and provided educators and students alike with a variety of opportunities to explore the subject matter in ways that encouraged research, discussion and creative presentations. The kits were also supported by professional development so that trainers had the background information they needed to support instruction and implement the activities in thousands of classrooms.

Agenda for Children - Based in New Orleans, Louisiana, Agenda for Children selected Lakeshore as their partner to provide educational kits and teacher training to support the transformation of outdoor spaces into vibrant learning and exploration areas across multiple early childhood centers. We worked hand in hand with their leadership team to customize the materials they needed, and also supported the project with a customized, easy-to-use website that made the ordering process as seamless as possible.

DEDICATED STAFF

At Lakeshore, we are proud to provide one point of contact to AACPS! Bobby Brennan will serve as your dedicated sales representative. You can depend on Bobby to provide personalized service to ensure that all AACPS' needs are met—from samples, to order to delivery. Bobby will work closely with AACPS teachers and staff and will provide product demonstrations, and training.

Bobby Brennan, Regional Sales Manager

Bobby is based in Baltimore, Maryland. Bobby's responsibilities include personally servicing customers in his respective areas of Maryland to ensure that each customer's needs are met and that they receive superior service and quality educational materials. Bobby will be available to AACPS. You can reach Bobby by phone at (443) 761-5058, by fax at (310) 537-7990 or by e-mail at rbrennan@lakeshorelearning.com.

Jon Spiegelhoff, Regional Vice President – Northeast

Jon has 14 years of experience at Lakeshore. He is responsible for managing 8 Regional Sales Managers in the Northeast Region of the United States. He ensures that all customers in his area are receiving the best possible service. He also has a direct role in servicing the top clients in the area. You can reach Jon by phone at (585) 230-6368, by fax at (310) 537-7990 or by e-mail at jspiegelhoff@lakeshorelearning.com.

Brittany Bacote, Sales Support Specialist

Brittany acts as a liaison between Lakeshore and the customer to ensure open lines of communication so the customer's expectations are met and exceeded. Her responsibilities include personal account service, management of large deliveries and orders that require special handling, general sales support and special events. You can reach Brittany by phone at (800) 421-5354, ext. 2292, by fax at (310) 537-7990 or by e-mail at bbacote@lakeshorelearning.com.

Todd Hays, Senior Vice President of Business Development Team & FF&E

Todd has 17 years of experience at Lakeshore. He is responsible for managing Lakeshore's elementary business development efforts throughout the United States. He has a direct role in servicing Lakeshore's top customer accounts and ensures that they receive the best possible services. You can reach Todd by phone at (720) 985-9457, by fax at (310) 537-7990 or by email at thays@lakeshorelearning.com.

In addition, Lakeshore's Bid Department is also available to ensure the completion of this project. Director of Bids and Contracts Jennifer Doran, Bid Manager Eunice Peterson, and Johanna Lopez will ensure that Lakeshore adheres to all contractual agreements and commitments, assist with renewals, and answer any questions regarding the contract. Our Bid Team is available via e-mail at biddept@lakeshorelearning.com or by phone at (800) 421-5354.

Should you have any questions, please feel free to contact Bobby Brennan at (443) 761-5058 or rbrennan@lakeshorelearning.com. Thank you in advance for giving Lakeshore Learning Materials the opportunity to serve you. We look forward to doing business with you!

Sincerely,



Johanna Lopez, Bid Analyst
Lakeshore Learning Materials