

LAKE WASHINGTON SCHOOL DISTRICT

Yearbook RFP #19-2384

OPENING: 3:00PM July 12, 2019

Prepared by: Kerri Kuykendall Smead

# ATTACHMENT “A” PROPOSED CERTIFICATION FORM





LAKE WASHINGTON SCHOOL DISTRICT NO. 414  
REDMOND, WASHINGTON  
REQUEST FOR PROPOSAL (RFP) NO. 19-2384  
Middle School and High School Yearbooks

PROPOSAL DUE DATE: 3:00 P.M., July 12, 2019

Sealed proposals must be received by the Lake Washington School District No. 414 (the "District") not later than 3:00 P.M., Pacific Time on July 12, 2019, for Middle School and High School Yearbooks. Each Proposal shall be in accordance with the specifications and documents now on file with the Purchasing Department.

Specifications and information for making proposals may be obtained from the Purchasing Department of the Lake Washington School District located at 16250 NE 74th Street, Redmond, Washington. Please email your request to: [wjohnsonkessler@lwsd.org](mailto:wjohnsonkessler@lwsd.org)

You must include your company name, address, e-mail, phone and fax numbers in your request.

Sealed proposals may be mailed or delivered to:

Wendy Kessler  
Purchasing Manager  
Lake Washington School District No. 414  
P.O. Box 97039  
16250 N.E. 74<sup>th</sup>  
Redmond, WA 98052

Late proposals will not be considered for award of contract.

The Board of Directors of the Lake Washington School District No. 414 reserves the right to reject any or all proposals and waive any informalities or irregularities in the process.

Wendy Kessler  
Purchasing Manager  
Lake Washington School District No. 414



## **1.0 INTRODUCTION**

The Lake Washington School District (the "District") is seeking proposals to provide middle school and high school yearbooks from a qualified Contractor in accordance with the requirements, specifications, and terms and conditions contained in this RFP.

### **1.01 BACKGROUND INFORMATION**

The District is the public school district for the cities of Kirkland and Redmond as well as about half of Sammamish. The District also includes portions of unincorporated King County. On the north end of the district, some Bothell and Woodinville residents also attend LWSD schools. There are 29 elementary schools, 7 middle schools, 4 comprehensive high schools, 12 choice schools of various grade levels on 43 sites, and 3 administrative buildings.

## **2.0 INSTRUCTIONS / PROPOSAL PREPARATION & SUBMISSION GUIDELINES**

### **2.01 GENERAL INSTRUCTIONS TO CONTRACTORS**

Please submit proposals in a sealed envelope addressed to Wendy Kessler, Purchasing Manager, Lake Washington School District No. 414, PO Box 97039, Redmond, Washington 98073. If delivered in person, deliver only to the Purchasing Department at 16250 NE 74th, Redmond, WA 98052. The envelopes shall also bear, on the outside, the name of the Contractor, Contractor's address, the proposal due date and plainly marked "PROPOSAL TO PROVIDE MIDDLE SCHOOL AND HIGH SCHOOL YEARBOOKS". It is the sole responsibility of the Contractor to see that his proposal is received by the designated time. Electronically transmitted proposals will not be accepted. Any proposal received after the specified time and date will be returned unopened.

### **2.02 PREPARATION OF PROPOSAL**

All blanks in the Proposal Form must be filled in appropriately. Proposals shall address each requirement described in this RFP as well as describing any variation from the stated requirements in this document. The original and one (1) copy of your proposal are required. The attachments are located at the end of this document.

2.02.1 The following attachment is for information only:

- Attachment "A": School District Map & Phone List

2.02.2 The following attachments must be completed and submitted as part of your proposal:

- Proposed Certification Form
- Attachment "B": Company Information
- Attachment "C": Non-Collusion Affidavit
- Attachment "D": References
- Attachment "E": Price List
- Attachment "F": Questionnaire
- One current sample of a middle school yearbook and one current sample of a high school yearbook



### **2.03 SIGNATURES**

The proposal must be fully completed in the name of Contractor and must bear the title and signature of the person duly authorized to sign the proposal.

### **2.04 WITHDRAWAL OF PROPOSAL**

Any Contractor may withdraw its proposal, either personally or by written request, at any time prior to the scheduled date and time for receipt of proposals.

### **2.05 INTERPRETATION OF DOCUMENTS**

If any potential Contractor is in doubt as to the true meaning of any part of the Request for Proposal, or finds discrepancies or omissions, they may submit to the District a written request for an interpretation or correction thereof. All requests must be received no later than July 08, 2019 at 1:00 p.m. Any requests received after that date and time will not be responded to. Request for interpretation of specifications must be emailed to Wendy Kessler, Purchasing Manager at [wjohnsonkessler@lwsd.org](mailto:wjohnsonkessler@lwsd.org). The Purchasing Department will not accept phone calls.

Any clarification or correction of the proposal documents will be made only by addendum duly issued and a copy of such addendum will be emailed to each person receiving a set of the RFP documents. All such addenda shall become part of the proposal documents. No oral interpretation of any provision in the RFP documents will be made to any Contractor.

### **2.06 RIGHT TO REJECT**

The District reserves the right to reject any and all proposals and to negotiate the terms of the contract, including the award amount, with the selected Contractor prior to entering into a contract. If contract negotiations cannot be concluded successfully with the highest scoring Contractor, the District reserves the right to negotiate a contract with the next highest scoring Contractor(s).

### **2.07 ASSIGNMENT OF CONTRACT**

The successful Contractor shall not assign the awarded contract nor any part thereof, to a third party or successor party without the express and prior written consent of the District.

## **3.0 GENERAL REQUIREMENTS**

### **3.01 LAW**

The laws of the State of Washington shall govern this RFP and the Contract with exclusive venue in the Superior Court for King County.



### **3.02 TAXES**

State sales tax and federal excise tax are not to be included in any item of this proposal, for purposes of comparison. The District is exempt from Federal Excise Taxes. Contractor assumes complete liability for all taxes applicable to the property, income and transactions of the Contractor.

### **3.03 INDEMNIFICATION/HOLD HARMLESS**

To the fullest extent possible by law, the Contractor shall defend, indemnify and hold harmless the District, its officers, agents, servants, and employees from any and all claims, damages, losses, actions, judgments, or other liability, including attorney's fees, arising out of, or resulting from (1) any acts or omissions of Contractor; (2) the violation of any third party trade secrets, proprietary information, trademarks, copyright, patent rights, or other intellectual property rights; (3) all injuries or death of persons, or damage to property, caused by acts of omissions of its officers, employees, agents, or subcontractors, including theft, except for injuries and damages caused by the negligence of the District, its officers or agents.

### **3.04 INSURANCE REQUIREMENTS**

The awarded Contractor shall provide insurance from a company lawfully authorized to do business in the State of Washington and with an A.M. Best and Co. rating of no less than A-. Such insurance will protect the District from claims arising out of, resulting from, or in connection with the performance of work hereunder by the Contractor, his agents, representatives, employees, or subcontractors. The District, its directors, officers, representatives, agents and employees, respectively shall have no responsibilities to the Contractor with respect to any insurance in accordance with the provisions set forth herein. The Contractor shall file Certificates of Insurance with the District prior to the commencement of the contract. Insurance limits shall not be less than the following:

#### **3.04.1 EMPLOYERS LIABILITY/WORKERS' COMPENSATION COVERAGE:**

All employees are to be insured under Washington State Industrial Insurance. Employees not subject to the State Act are to be insured under Employer's Liability with a \$1,000,000 limit of liability. A separate Certificate of Insurance will be provided to the District if any of the Contractor's payroll is not reported to Washington State Industrial Insurance.

#### **3.04.2 GENERAL LIABILITY/AUTOMOBILE INSURANCE**

Commercial General Liability issued on form CG 00 01 \$1,000,000 Per Occurrence for Bodily Injury and property damage  
\$1,000,000 Personal Injury  
\$2,000,000 Annual Aggregate

An endorsement shall be issued on the General Liability Policy naming Lake Washington School District; its directors, officers, representatives, employee and agents as additional insured. The policy shall include a waiver of subrogation clause and be primary and non-contributory. Lake



Washington School District's coverage shall be considered excess over any other available coverage.

If contractor provides services on District owned property: Commercial Automobile Liability of at least \$1,000,000 providing owned, hired and non-owned auto liability.

#### 3.04.3 OTHER INSURANCE TO BE PROVIDED BY THE CONTRACTOR:

Any insurance for higher limits of coverage which the Contractor may be required by law to carry or may desire for its protection shall be at its own expense. Any policy of insurance covering any Contractor's owned or leased machinery, vehicles, tools, watercraft or equipment against physical loss or damage shall provide a Waiver of Subrogation Rights against the District, its directors, officers, employees, agents, or assigns.

#### 3.04.4 OTHER INSURANCE PROVISIONS:

The policy is to contain, or be endorsed to contain, the following provisions:

Lake Washington School District, its directors, officers, representatives, employees and agents are to be named as additional insured's with an additional insured endorsement as respects: liability arising out of activities performed by or on behalf of the Contractor; products and completed operations of the Contractor; premises owned, leased or used by the Contractor; or automobiles owned, leased, hired or borrowed by the Contractor. The coverage shall contain no special limitations on the scope of protection afforded to Lake Washington School District, its directors, officers, representatives, employees or agents.

Contractor's insurance coverage shall be primary insurance as respects the Lake Washington School District, its directors, officers, representatives, employees and agents. Any insurance or self-insurance maintained by Lake Washington School District, its directors, officers, representatives, employees or agents shall be in excess of the Contractor's insurance and shall not contribute to it.

Any failure to comply with reporting provisions of the policies shall not affect coverage provided to Lake Washington School District, its directors, officers, representatives, employees or agents. The Contractor's insurance shall apply separately to each insured against whom a claim is made, or lawsuit is brought, except with respect to the limits of the insured's liability.

Coverage shall not be suspended, voided, canceled, or reduced in coverage or in limits except after notification has been given to Lake Washington School District as soon as possible.

#### 3.04.5 ACCEPTABILITY OF INSURERS:

Insurance is to be placed with insurers with an A.M. Best Company rating of no less than A-, or if not rated by A.M. Best, with minimum surpluses the equivalent of Best's A- rating.



#### **3.04.6 VERIFICATION OF COVERAGE:**

The awarded Contractor shall furnish District with certificates of insurance and with endorsements effecting coverage required by this contract. The certificates and endorsements for each insurance policy are to be signed by a person authorized by the insurer to bind coverage on its behalf. Lake Washington School District reserves the right to require complete, certified copies of all required insurance policies at any time. Contractor shall not allow any subcontractor to commence work until all similar required insurance has been obtained and approved. Approval of the insurance by the District shall not relieve or decrease the liability of the Contract hereunder. Failure to furnish either satisfactory insurance or the required certificates within ten (10) days of award letter shall be considered cause for termination.

#### **3.05 EQUAL EMPLOYMENT OPPORTUNITY COMPLIANCE STATEMENT**

The Contractor agrees not to discriminate against any client, employee, or applicant for employment or for services because of race, creed, color, religion, national origin, sex, age, sexual orientation, marital status, or the presence of any physical, sensory or mental or physical handicap, nor shall the Contractor commit any of the other unfair practices defined in Chapter 49.60 RCW, the Washington State Law against discrimination.

In the event of noncompliance by the Contractor with any of the nondiscrimination provisions of the contract, the District shall have the right, at its option, to cancel the contract in whole or in part. If the contract is canceled after part performance, the District shall be obligated to pay the fair market value or the contract price, whichever is lower, for goods or services which have been received and accepted.

#### **3.06 TOBACCO, DRUG AND ALCOHOL-FREE ENVIRONMENT AND WORKPLACE**

Pursuant to RCW 28A.210.310, the Board of Directors of the District has established a policy that smoking or use of any kind of lighted pipe, cigar, cigarette, or any other lighted smoking equipment, material, or smokeless tobacco products is prohibited on all District property. The Contractor and all employees, subcontractors and consultants, must fully comply with all applicable federal, state, local laws and regulations regarding drug-free workplace, including the Drug-Free Workplace Act of 1988. Any person not fit for duty for any reason, including the use of alcohol, controlled substances, or drugs, shall immediately be removed from the site, providing services, or this contract.

#### **3.07 EMPLOYEES WHO HAVE PLED GUILTY OR CONVICTED OF CRIMES INVOLVING CHILDREN**

Pursuant to RCW 28A.400.330, Contractor shall not utilize any employee at the District site or allow any contact between school children and any employee who has plead guilty to or been convicted of any felony crime involving the physical neglect of a child under Chapter 9A.42 RCW, the physical injury or death of a child under Chapter 9A.32 or 9A.36 RCW, sexual exploitation of a child under Chapter 9.68A RCW, sexual offenses under Chapter 9A.44 RCW where a minor is the victim,



promoting prostitution of a minor under Chapter 9A.88 RCW, the sale or purchase of a minor child under 9A.64.030 RCW, or violation of similar laws of another jurisdiction.

Contractors, or their employees, who will have regularly scheduled unsupervised access to children, and/or who hire employees who will have regularly scheduled unsupervised access to children under sixteen years of age, developmentally disabled persons, or vulnerable adults during his or her involvement with the District, shall perform a record check through the Washington State Patrol criminal identification system and criminal history system under RCW 43.43.832 and RCW 10.97.030 and 10.97.050, and through the Federal Bureau of Investigation before hiring the employee. The record check shall include using a complete criminal identification fingerprint card. The Contractor shall provide a copy of the record to the person applying for employment to the District. If the Contractor or applicant has had a record check within the previous two years, the Contractor may waive the requirement.

### **3.08 DEBARMENT**

Awarded Contractor is subject to WAC 262-03 and warrants that it is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded for the award of contracts by any local, state or federal agency or department.

### **3.09 AUDITS**

The books, records, documents, and accounting practices and procedures of the Contractor relevant to the contract must be available for the District and/or State audit(s) at any time during the term of the Contract, and for six (6) years after completion or termination of the Contract.

### **3.10 PUBLIC RECORDS / PROPRIETARY INFORMATION**

This RFP and one copy of each proposal received in response to it, together with copies of all documents pertaining to the award of a contract, shall be kept by the District and made part of a file or record, which shall be available to public inspection in accordance with Washington State laws. If a proposal contains any information that is considered proprietary and/or a trade secret, the District shall, upon written request by the Contractor, either exempt from public inspection and copying such proprietary data or give notice to the Contractor of the public records request in order for the Contractor to seek a restraining order from the production of any documents a Contractor considers exempt. Each page of proprietary information shall be marked with the following caption:

"This data is proprietary information and/or constitutes a trade secret and shall not be disclosed except in accordance with the Public Records Act of the State of Washington"

Sheets containing proprietary and/or trade secret information must not contain any non-trade secret material. A violation of this requirement shall result in the entire sheet being subject to public disclosure. The District will not be held liable in the disclosure of proprietary information and/or trade secret material.



### **3.11 CONFLICT OF INTEREST**

Contractor must provide a list of all entities with which it has relationships that create, or appear to create, a conflict of interest with the work that is contemplated in the RFP. The list should indicate the names of the entity, the relationship, and a detailed description of the potential conflicts. Non-disclosure of any potential conflicts of interest may be sufficient cause to disqualify the Contractor's proposal or can be considered cause for termination of the contract.

### **3.12 DISPUTES**

If a dispute arises between the parties to the contract and they are not able to resolve it themselves, a non-binding mediation before a single mediator shall be required as a condition precedent to litigation. If the parties are unable to agree on a single mediator, they shall submit the dispute to Judicial Dispute Resolution in Seattle in order to select a mediator. Each party shall pay one-half of the mediation fee. If parties are not able to resolve the matter in mediation, both parties agree that any litigation related to this contract shall be filed in King County Superior Court for the State of Washington.

### **3.13 TERMINATION**

#### **3.13.1 Termination for convenience**

The District may terminate the contract, in whole or in part, when it is in the best interest of the District, at any time for any reason by giving one hundred and twenty (120) calendar days' written notice to the Contractor. Compensation to the Contractor shall be adjusted to equitably compensate the Contractor for the work performed to date of termination. Contractor claims resulting from termination shall be limited to payment for work completed and materials ordered prior to the termination date, provided that such ordered materials are subsequently delivered to District with a clean bill of sale.

#### **3.13.2 Termination for default**

The District may give thirty (30) days written notice of default of the contract, in whole or in part, for failure of the Contractor to perform any of the obligations or provisions of the contract. The District shall expect the Contractor to immediately begin correction of the deficiency and have such failure or violation to be corrected within thirty (30) days. If such failure or violation is not corrected within thirty (30) days of receipt of the notice, the contract may be terminated at the discretion of the District.

In the event of termination, the District shall thereupon have the right to purchase on the open market the services required hereunder. The District shall have the right to deduct from any monies due or that thereafter become due to the Contractor. The District requires the



Contractor to pay for additional cost for procuring another Contractor for services, but not limited to the following:

- 1) Any cost difference between the original price of services and the replacement cost of services, and
- 2) All administrative costs directly related to the replacement contract such as, costs of competitive solicitation, mailing, advertising, applicable excess financing charges or penalties, staff time and the like.

### **3.14 PREPARATION EXPENSE**

The Contractor shall bear all costs, directly or indirectly related to preparing a proposal, presentations, and any supplements, and/or clarifying a proposal as required by the District.

### **3.15 INVOICING/PAYMENT**

Payments will be made from Contractor's original invoice. Invoices must be submitted in duplicate to Accounts Payable, LWSD #414, PO Box 97039, Redmond, WA 98073. The District will process payments in a timely manner after the receipt and acceptance of goods / services is complete. Invoices received by the District must be itemized per District purchase order(s). District purchase order number must be shown on all invoices.

### **3.16 EARLY PAYMENT DISCOUNTS**

The District processes invoices for payment weekly and thus can take advantage of any early payment discounts offered (e.g.: 1/10, net 30, etc.). Contractors offering payment discounts must include this information on their proposal. Such discounts will be considered during the proposal evaluation process.

### **3.17 PURCHASING CARD ACCEPTANCE**

The District has a purchasing card program in place to reduce total purchasing cost. At present, the purchasing card in use is a MasterCard. Contractor's acceptance of this mode of payment will be taken into consideration during the bids evaluation process. There should be no additional cost to the District for the use of the purchasing cards as a form of payment.

### **3.18 PRICING ADJUSTMENTS / INCREASES**

For the initial period of this contract, pricing shall remain unchanged until August 31, 2020. Contractor may submit a written request to District's Purchasing Department for an adjustment in pricing/discounts up to, but no later than, thirty (30) days prior to the contract renewal date. Any price increases shall be fully substantiated and documented. The District reserves the right to terminate and rebid the Contract rather than accept the price increase(s). If the Contractor wishes to decrease prices, the District will accept such notification at any time. Contractor shall pass through to the District any and all promotional pricing which may occur during the contract period.



### **3.19 MINIMUM WAGE COMPLIANCE**

Within the 3-year period immediately preceding the date of this proposal, Contractor shall not have been determined by a final and binding citation and notice of assessment issued by the Department of Labor & Industries or through a civil judgment entered by a court of limited or general jurisdiction to have willfully violated, as defined in RCW 49.48.082, any provision of Chapter 49.46, 49.48, or 49.52 RCW.

## **4.0 PRODUCT REQUIREMENTS**

### **4.01 PACKAGING**

All products shipped to the District shall be securely packaged to protect their integrity in accordance with best accepted trade practices, to withstand elements and rough handling during transportation. All cases must include a packing slip and /or delivery ticket shall be included in each shipment and shall contain the following information: Purchase Order number, Contractor's name, product description, quantity, and delivery location / address. Any damaged or missing goods must be replaced immediately and at no charge to the District.

### **4.02 PRODUCT QUALITY**

Vendor must have in place a quality management system, which is permitting the achievement of high level of standards of quality, and Vendor shall guarantee that District yearbooks will be of the highest quality, and that service will be of the highest standards. The District reserves the right to reject any and all yearbooks that have been damaged or incorrectly printed in any manner. Defects may include but are not limited to: scuffing of the binding, brown spotting on the pages and the edges (foxing), chipped cover or pages, loose binding, and non-uniformity in printing (structural faults, color variations, missing characters, ink splashes, streaks, dot gain, doubling, etc.).

### **4.03 QUANTITIES / MINIMUM ORDERS**

The quantities are estimates only, and in no way obligate the District. The District reserves the right to increase or decrease quantities as required. If Contractor wishes to set a minimum order dollar amount, he must do so by indicating this information in his proposal.

Vendor's over-run policy must be described in attached Proposal Form. A price discount must be offered on the over-run books. The Contractor must carefully plan its production material needs to avoid under-runs. At its own discretion, when facing an under-run situation, the District may request the Vendor to immediately produce another run of books to complete the quantity ordered, without an additional cost to the District.

## **5.0 CONTRACT SCOPE**



## **5.01 SCOPE OF WORK**

The Lake Washington School District is seeking proposals from qualified vendors for the Production and successful delivery of yearbooks in accordance with the terms, conditions, general requirements, and specifications contained in this RFP. At this time, this Request for Proposal is limited only to our Middle Schools and High Schools (refer to Attachment "B" and "C" for a school listing and School District map). Some schools are Choice Schools and Yearbooks may be produced by the Parent Teacher Student Association (PTSA), so they may elect not to use this contract.

## **5.02 CONTRACT TERM**

The period of performance under this Contract will be from the award date of the Contract, through August 31, 2020. The term of this agreement may be extended by four (4) additional one (1) year increments, which the District has the option to exercise with mutually agreeable terms for the District and the Contractor. At the August 31 renewal date each year, the Contract will self-renew unless Contractor is notified by the District within thirty (30) days prior to the end of the contract period.

## **5.03 CONTRACT TYPE**

This is a NON-EXCLUSIVE contract. District expressly retains the right to secure the services through any Government Purchasing Alliance (GPA) contract, Inter-local Cooperative Purchasing Agreement, or other sources.

# **6.0 CONTRACTOR PREREQUISITES**

## **6.01 CONTRACTOR QUALIFICATIONS / REQUIREMENTS**

Only proposals submitted by Vendors with the relevant experience, qualifications and capacity to meet the needs of the Lake Washington School District will be accepted.

Vendor must meet the following qualifications/requirements:

### **6.01.1 Personnel**

The selected Vendor shall designate a qualified yearbook representative of the company to assist in the planning, processing, ordering, and delivery of yearbooks. The representative must be available to consult with school staff, and therefore shall make periodic visits to the schools to work with the advisor, the yearbook team, and any other staff or students involved in the yearbook.

Upon request, Vendor's representative must be on school sites during the first weeks of classes, and a few days before every deadline. The representative should provide free of charge, yearbook staff training workshops to be scheduled at the convenience of the representative and school staff. Summer camps or equivalent alternatives should also be available to our students. The yearbook representative is expected to answer questions by phone and/or e-mail within one business day after being contacted.



Vendor shall designate a representative at the printing plant capable of assisting with technical questions over the phone and by email, and to make decisions regarding changes and/or corrections to the yearbooks.

6.01.2 Page Layout Software Program

Vendor must give on-line access to their page layout software program at no charge. For school locations where Adobe InDesign, Photoshop, or Pagemaker software is used, Vendor's representative shall provide support as requested by school's yearbook advisor.

6.01.3 Plant Capabilities

The Vendor shall have state of the art production equipment capable of achieving best in the industry results, and of handling all aspects of the production process, including but not limited to: film making, proofing, printing, trimming, binding, and collating.

6.01.4 Plant Production Supplies

The Vendor is responsible for procuring all supplies, utilities, and related expenses for items necessary to provide the services called for in the Contract unless otherwise agreed to in writing by District. The Vendor must also keep adequate inventories of supplies to complete the production of the yearbook by the deadlines specified.

6.01.5 Permits/Licenses

It shall be Vendor's responsibility to obtain any license, permit, or approval required from any agency for work/services to be performed at his/her own expense, prior to commencement of said work/services, or forfeit any right to compensation under this agreement.

6.01.6 Yearbook Kit

At the start of the contract, the Vendor shall supply free of charge a yearbook kit to school. The kit shall provide all necessary tools and support materials required to layout and design the yearbook as well as posters and marketing materials to promote sales. If kits are mailed to the school, a tracking number must be provided to the school yearbook advisor.

6.01.7 Paper Stock

All inside pages are standardized with 100# glossy paper stock or 100# double laminated to ensure quality.

6.01.8 Page Size

The District is currently using two trim sizes; 8.5" x 11" and 9" x 12".



6.01.9 Page Count/Multiple Submissions

Vendor's Proposal must confirm if a yearbook page count divisible by 4 or 8 can reduce production and book cost. Vendor must also confirm on Proposal Form if submission by multiples is a requirement.

6.01.10 Cover

The hard case cover must be strong and dense, resistant to softening on corners, and using hard 120-point tempered Binders Board for trim size 8.5" x 11" yearbooks and 160# for trim size 9" x 12" yearbooks. The cover board must be first quality, tempered Binders Book Board. The Vendor must offer the option to print the cover using litho 4 color process or silk screening 4 colors.

6.01.11 End Sheets

Stock for end sheets shall be of fine quality and capable of providing sound and flexible connections between the binding and the text block. Paper weight should be 120/125# for 8.5" x 11" yearbooks and 145/150# for 9" x 12" yearbooks.

6.01.12 Binding

Books will be tightly Smyth Sewn, and reinforced with fabric backing and adhesive.

6.01.13 Proofs

Proofs are required on all pages. These must show all elements of the page in the correct location. In addition, all artwork and halftones must be in place and to size. Headlines and copy must be in finished face, size and location. Proofs should be available in online PDF format.

**A. Litho Printing**

The first stage proofing process on interior pages and cover (prior to making film-derived proofs) is to be done using laser printed proofs showing page elements in their exact positions for printing (not to judge print quality or color accuracy). Once this first proofing has been submitted to the Vendor with the required changes, if any, the Vendor shall allow on-line proofing (or equivalent) to validate the changes made. The final stage of the proofing process is to be done using film-based proofs, which is to be used to judge print quality. The cost of proofs are to be included in basic yearbook unit.



## **B. Digital Printing**

The Vendor must give the option to proof read and make the corrections on-line or as a paper proof. The cost of the proofs are to be included in basic yearbook unit price.

### **6.01.14 Online Sales**

The vendor must stipulate on the Form of Proposal if individuals can place online orders for yearbooks directly on the Vendor's website with no additional cost to the school, District, or parent/student placing the order.

### **6.01.15 Reorders**

The Vendor shall allow reorders in the event that the District requires additional printed copies of a yearbook after the initial run. Vendor's reorder policy must be described on the Proposal Form.

### **6.01.16 Working Materials**

Any physical material used by District's schools in publication of the yearbook shall be returned to the schools at the time the yearbooks are shipped. The boxes containing this material should be clearly identified.

### **6.01.17 Reporting Requirements**

Immediately after completion of all yearbook deliveries to the schools, the Vendor shall provide the Purchasing Department with a detailed annual report itemizing all orders placed, delivered, and invoiced during the school year.

### **6.01.18 Book Deadlines (Excluding Supplement)**

The Vendor together with the School Yearbook Advisors will set-up project deadlines based on desired delivery dates. Vendor's representative shall continuously keep school advisors informed on the status of the yearbook.

Should it appear that the final delivery dates are in jeopardy as a result of missed deadlines, the Vendor's representative is responsible for informing immediately the school's yearbook advisor and the Purchasing department about the situation so that a corrective action can be put in place. In the event that overtime work becomes necessary, Vendor will not be authorized to proceed with any overtime work until the overtime charges are pre-approved by the District.

The Vendor agrees to notify the District Purchasing Department immediately, in writing, in the event of any delays caused by Contractor's operations.



6.01.19 Supplement

Schools that produce a supplement will determine when the supplement will be produced, and deadlines will be mutually agreed upon between the school and the Vendor.

6.01.20 Non-Compliance

1. For failure to deliver the yearbooks by the promised delivery dates (without acceptable reasons) the District shall retain as liquidated damages the sum of two hundred dollars (\$200) per day for each calendar day thereafter that the Vendor remains delinquent in delivering a complete and acceptable order to the District as specified. This charge is levied not as a penalty but as liquidated damages for such breach of contract.

2. Failure to meet specifications, and after due oral or written notice by the District, authorizes the District to immediately recover all production material in Vendor's possession including high resolution digital files necessary for quality printing to produce the yearbooks, to purchase the yearbooks elsewhere, and to charge in full any increases in cost and handling to the defaulting Vendor.

**6.02 EVIDENCE OF RESPONSIBILITY / CAPABILITIES**

To be considered as a responsible Contractor, the Contractor must provide the following mandatory information in the proposal. Failure to provide this information may be cause for the proposal to be rejected. At its sole discretion after receipt of the proposals, the District reserves the right to conduct discussions with Contractors in order to clarify the information contained in their proposal.

6.02.1 Company Information

Contractor shall complete Attachment "B".

6.02.2 Conflict of Interest Statement

Contractor must provide a list of all entities with which it has relationships that create, or appear to create, a conflict of interest with the work that is contemplated in the RFP. The list should indicate the names of the entity, the relationship, and a detailed description of the potential conflicts. Non-disclosure of any potential conflicts of interest may be sufficient cause to disqualify the Contractor's proposal or can be considered cause for termination of the contract.

6.02.3 Contractor Qualifications / Experience

Provide a brief descriptive statement detailing evidence of Contractor's ability to deliver the product / services sought under this RFP (e.g.: prior direct experience, qualifications, certifications, resources, quality management systems, etc.).



The District may make such reasonable investigations as deemed proper and necessary to determine the ability of the Vendor to perform the work and the Vendor shall furnish all such information and data for this purpose as may be requested. The District reserves the right to inspect Vendor's physical facilities prior and/or after award to satisfy questions regarding Vendor's capabilities. The District further reserves the right to reject any proposal if the evidence submitted by, or investigations of, such Vendor fails to satisfy the District that such Vendor is properly qualified to carry out the obligations of the contract and complete the work.

6.02.4 References

The Contractor must provide under Attachment "D" a minimum of three (3) trade references, preferably school districts of similar size/volume for which the Contractor is currently providing the same or similar products / services.

6.02.5 Financial Stability / Capability

6.02.5.1 The Contractor must provide evidence of financial stability and capability to adequately perform the contract. Such evidence of financial strength may be financial statements (audited or unaudited) or other format which is reasonably acceptable to the District. Any financial statements or other proprietary information submitted by the Contractor as a part of this RFP will be maintained by the District as confidential and is exempt from disclosure under the Public Records Act.

6.02.5.2 Provide a statement of whether, in the last ten years, the Contractor has filed (or had filed against it) any bankruptcy or insolvency proceeding, whether voluntary or involuntary, or undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors. If so, include an explanation providing relevant details.

6.02.6 Contractor Organization

Describe your organizational structure and explain how your organization qualifies to be responsive to the requirements of this RFP. Special attention should be given on Contractor's organizational resources, depth of resources, capability to obtain resources, and qualifications of personnel to support this contract.

## 7.0 PROPOSALS EVALUATION AND AWARD PROCESS

The District shall thoroughly review and subject proposals to an objective evaluation. An initial screening of proposals will be conducted based on the criteria set forth in this RFP. Proposals that do not meet the criteria will not be considered further. The District reserves the right to select a single Contractor for award of a contract based solely on the written proposal, and not to enter into any further discussions or



negotiations. The District also reserves the option to meet with two or more Contractor and conduct negotiations based on the proposals in order to select the best proposal, all factors considered.

Award shall be made to the qualified Contractor whose proposal provides the best overall value to the District, when taking into consideration the evaluation criteria set forth below, including overall long-term value to the District.

Factor Number	Evaluation Criteria	Points
1	Total yearly cost to the District	30
2	Qualifications, financial viability, firm's capabilities, experience	35
3	References (past performance, quality of service, reliability)	15
4	Compliance with the requirements of the RFP	15
5	Early payment discounts offered / P-card acceptance	5
	Total Points	100

## **8.0 CONTRACTOR PERFORMANCE EVALUATION**

The District's Vendor Performance Evaluation will apply to the awarded Contractor. The Contractor will undergo performance monitoring and evaluation based on the following evaluation criteria (subject to change):

- Quality of service (reliability, dependability).
- On-time service.
- Timeliness of contract actions.
- Conformance to specifications and requirements.
- Timely and effective communications.
- Professionalism and courtesy of staff.
- Responsiveness to changing needs.
- Problem resolution support.
- Cost containment effort.

## **9.0 ENTIRE AGREEMENT**

The standard Terms and general requirements and conditions shall apply, and are incorporated by reference, to any contract, including purchase order, awarded as a result of this RFP. Special requirements of the awarded contract may also apply. Said written contract with referenced parts and attachments shall constitute the entire agreement, and no other terms and conditions in any document, acceptance, or acknowledgment shall be effective or binding unless expressly agreed to in writing by the District.



**Proposed Certification Form**

**REQUEST FOR PROPOSAL (RFP) NO. 19-2384**

Contractor has examined and is familiar with all of the conditions and requirements specified in this RFP. Contractor meets all of the standards and requirements necessary to perform the services/provide the products and is able to furnish the services/products in the time frame specified and at the rates set forth in this proposal.

The undersigned certifies that he/she has had the opportunity to ask questions regarding the Request for Proposal, and that if such questions have been asked; they have been answered by the District.

The undersigned has the authority to bind Contractor and certifies that all statements contained in the proposal are true and correct.

The undersigned Contractor hereby certifies that, within the 3-year period immediately preceding bid solicitation date of this RFP, the Contractor is not a "willful" violator, as defined in RCW 49.48.082, or any provisions of Chapter 49.46, 49.48, or 49.52 RCW, as determined by a final and binding citation and notice of assessment issued by the Department of Labor & Industries or through a civil judgment entered by a court.



ADDENDA

Receipt of addenda number(s) \_\_\_\_\_ are hereby acknowledged.

SIGNATURES

Dated this 10<sup>th</sup> day of July, 2019 KS

Balfour Publishing Co.  
LEGAL NAME OF PERSON, FIRM/CORPORATION  
SUBMITTING PROPOSAL

Corp!  
1550 W. Mockingbird Lane  
ADDRESS  
Dallas TX 75235

Keri Smead  
AUTHORIZED SIGNATURE

LOCAL 13748 SE 172nd St  
Renton WA 98058  
CITY, STATE & ZIP

Kerri Smead  
NAME PRINTED OR TYPED

kerri.smead@balfour-rep.com  
E-MAIL ADDRESS

Yearbook Specialist  
TITLE

425-503-7016  
TELEPHONE NUMBER

425-496-8090  
FAX NUMBER

601-780-508  
UBI NUMBER

END OF PROPOSED CERTIFICATION FORM

-----  
FOR LWSD USE ONLY:

\_\_\_\_\_  
PURCHASING OFFICER

\_\_\_\_\_  
WITNESS

\_\_\_\_\_  
DATE



LAKE WASHINGTON SCHOOL DISTRICT

Yearbook RFP #19-2384

OPENING: 3:00PM July 12, 2019

Prepared by: Kerri Kuykendall Smead

# ATTACHMENT “B” COMPANY INFORMATION





ATTACHMENT "B"

COMPANY INFORMATION

1.0 General Information

Company Name	Balfour Publishing		
Business Address	1550 W. Mockingbird Lane, Dallas TX 75235		
Contact	Kerri Smead	P: 425-563-7016	Email: kerri.smead@balfour-rep.com

2.0 Company Details

Years in Business	90 years
Parent Company	American Achievement Corp
Business License Number	WA # 1661-780-508 Corp 75-1251430
Type of Organization (1)	Corporation - Private
Type of Business (2)	Publishing company/manufacturer
Products / Services	Yearbooks, memory books and Grad Products
Number Employees	average of 750
Experience (3)	Public & private schools, colleges, military and
Largest Accounts (3)	Woodlands HS - Woodlands TX and Baylor University - Waco TX both are more than \$150,000 accounts.

(1) Public, Private, Government Sponsored, Other (Please Specify)

(2) Manufacturer, Retailer, Authorized Agent, Consulting Company, Other (Please Specify)

(3) With School Districts, Colleges, and Universities.

Name and title of person completing this questionnaire:	Kerri Smead Yearbook Specialist
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## COMPANY PROFILE

**Balfour Yearbooks**  
Executive Offices  
1550 W. Mockingbird Lane  
Dallas, TX 75235

Bob Myers, President & CEO  
Sherice Bench, Chief Operations Officer  
Divakar Jandhyala, Chief Technology Officer  
Klaus Gerber, Interim Chief Financial Officer  
Mark Goshgarian, General Manager  
Mike Parker, VP Sales, Publishing  
Donna Finn, Regional Sales Manager

1-800-677-2800 1-512-440-2160 fax

### **PUGET SOUND REPRESENTATIVE**

Kerri Kuykendall Smead  
13748 SE 172nd St  
Renton WA 98058

### **PRODUCTION CUSTOMER SERVICE REPRESENTATIVE**

Cathy Simoneaux  
1-800-947-0408  
Catherine.Simoneaux@balfour.com

### **TECH SUPPORT REPRESENTATIVE**

Stuart Hagen - Dallas  
1-800-947-0510  
Stuart.Hagen@balfour.com





## WHO WE ARE

At Balfour, we are re-defining the way yearbooks are created through technological innovation, team-based manufacturing and extraordinary customer care. We provide a complete yearbook experience, so you and your staff make the most of your memories.

Every yearbook is one-of-a-kind publication - the official record of the school year and a treasured keepsake for students and their families. At Balfour, we never lose sight of that. As we have for nearly 80 years, our people, innovative technology and a dedication to quality ensure your yearbook will be the best one ever for your school and community.

While we're dedicated to maintaining the highest standards in printing and design, we know technology can never interfere with caring for our customers. It's our job to print a quality publication for you, but it's just as important for us to make the yearbook experience a fun and educational one for you and your students.

### You Can Trust Your Yearbook to THE Print Technology Leader

- 100% digital pre-press and direct-to-plate imaging for noticeably sharper reproduction
- Individual color-correction of your images ensures consistent reproduction and color sharpness from page to page
- Digitally-controlled, eight-color Komori presses print both sides of the press sheet simultaneously, improving speed and ensuring ultra-precise color registration
- Exclusive use of soy-based inks and alcohol-free press solutions to protect the environment
- State-of-the-art digitally-monitored bindery systems ensure durability and longevity for every copy of your yearbook
- World's largest computer-to-plate print facility
- Largest pressroom in the western United States
- Numerous industry awards for quality and productivity: Kodak, HP, Komori, PIA and GATF







AMERICAN ACHIEVEMENT CORPORATION

**COMPANY INFORMATION:**

**Corporate Name:**

American Achievement Corporation  
dba: Balfour, Commemorative Brands, ArtCarved,  
Taylor Publishing Co.

### Tax ID's

13-4126506 - American Achievement Corp.  
13-3915801 - Commemorative Brands, Inc.  
75-1251430 - Taylor Publishing Company

**TRADE REFERENCES:**

<b>Dallas:</b>	Clampitt Paper Company 9207 Ambassador Row Dallas, TX 75229 T: (214) 638-3300 F: (214) 634-7837	Top Level Printing 9110 Premier Row Dallas, TX 75247 T: (214) 267-9010	Loews Vanderbilt Hotel 2100 West End Avenue Nashville, TN 37203 T: (615) 340-5976 F: (615) 340-5836
<b>Austin:</b>	Horizon Printing 2111 Grand Ave Parkway Austin, TX 78728 T: (512) 989-0006 F: (512) 989-8404	Capital Printing 4001 Caven Road Austin, TX 78744 T: (512) 442-1415 TF: (800) 789-2695	Ransom & Randolph 3535 Briarfield Dr. Maumee, OH 43537 T: (800) 800-7496 F: (419) 865-9997

**OTHER INFORMATION:**

<b>Purchasing:</b>	<u>Dallas</u> Shirley Martin T: (214) 819-8323 F: (214) 819-8580 <u>Shirley.Martin@balfour.com</u>	<u>Austin/Kentucky</u> Shawn Walker T: (512) 416-3861 F: (512) 440-2436 <u>Shawn.Walker@balfour.com</u>	<u>Waco</u> Diane Mason T: (254) 754-2498 <u>Diane.Mason@balfour.com</u>
<b>Remittance Address:</b>	1550 W. Mockingbird Lane Dallas, TX 75235	P.O. Box 149107 Austin, TX 78714-9107	P.O. Box 149107 Austin, TX 78714-9107
<b>Shipping Address:</b>	<u>Dallas</u> 1550 W. Mockingbird Lane Dallas, TX 75235	<u>Austin</u> 7211 Circle S Rd Austin, TX 78745	<u>Kentucky</u> 7101 A Intermodal Dr. Riverport Industrial Park Louisville, KY 40258
			<u>Waco</u> 2825 Gholson Rd Waco, TX 76704

<b>Bank Information:</b> JP Morgan Chase 221 W. 6 <sup>th</sup> St., 2 <sup>nd</sup> Floor Austin, TX 78759 Contact: Gabe Terrazas T: (512) 479-2783	<b>Accounts Payable:</b> <u>Dallas:</u> Brenda Pendley Brenda.Pendley@balfour.com <u>Austin/Kentucky/Waco:</u> Venus Morales accountspayable@balfour.com	<b>Officers:</b> Robert Myers, President / CEO „ CFO Sherice Bench, COO Cari Hudkins, VP Corporate Controller
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## RESELLER PERMIT

STATE OF  
WASHINGTON

## RESELLER PERMIT

Washington State Department of Revenue

PO Box 47476 • Olympia, WA 98504-7476 • 1-800-647-7706

**Issued to:**601-780-508  
COMMEMORATIVE BRANDS INC.  
7211 CIRCLE S RD  
AUSTIN, TX 78745-6603**Permit Number:** A05895021**Effective Date:** Jan-01-2018**Expiration Date:** Dec-31-2021**Business Activities:**

All Other Miscellaneous Store Retailers (except Tobacco Stores)

**This permit can be used to purchase:**

- Merchandise and inventory for resale without intervening use
- Ingredients, components, or chemicals used in processing new articles of tangible personal property produced for sale
- Feed, seed, seedlings, fertilizer and spray materials by a farmer
- Materials and contract labor for retail/wholesale construction
- Items for dual purposes (see Purchases for Dual Purposes on back)

**This permit cannot be used to purchase:**

- Items for personal or household use
- Promotional items or gifts
- Items used in your business that are not resold, such as office supplies, equipment, tools, and equipment rentals
- Materials and contract labor for public road construction or U.S. government contracting (see Definitions on back)
- Materials and contract labor for speculative building

**This permit is no longer valid if the business is closed.****The business named on this permit acknowledges:**

- It is solely responsible for all purchases made under this permit
- Misuse of the permit:
  - Subjects the business to a penalty of 50 percent of the tax due, in addition to the tax, interest, and penalties imposed (RCW 82.32.291)
  - May result in this permit being revoked

**Notes (optional):** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_**Important:** The Department of Revenue may use information from sellers to verify all purchases made with this permit were qualified.



Proprietary and Confidential

## American Achievement Group Holding Corp.

### Consolidated Draft Financials (Unaudited)

American Achievement Group Holding Corp. operates as a holding company. The Company, through its subsidiaries (such as: ArtCarved®, Balfour®, Keepsake® and Taylor Publishing®), manufactures and supplies class rings, yearbooks, graduation products, achievement publications, and affinity jewelry. American Achievement's legacy is based upon the delivery of exceptional, innovative products, including class rings, yearbooks, graduation products, achievement publications and affinity jewelry through in-school and retail distribution. American Achievement's products are available through a variety of distribution methods, including direct sales to students in high schools and colleges, national jewelry retailers, independent jewelry stores and mass merchandisers.

American Achievement Group Holding Corp.

Consolidated Statements of Comprehensive Income (Loss) - Draft Financials (Unaudited)  
Years Ended August 31, 2018, 2017, 2016 and 2015  
(Dollars In Thousands)

	2015 Actual	2016 Actual	2017 Actual	2018 Actual	2019 FEB YTD Actual	2019 Forecast (6+6)*
Sales	285,728	260,841	255,425	244,678	72,622	250,387
Cost of Sales	127,152	95,795	100,222	96,554	34,254	102,885
<b>Gross Profit</b>	<b>158,576</b>	<b>165,046</b>	<b>155,203</b>	<b>148,124</b>	<b>38,367</b>	<b>147,502</b>
SG&A	100,516	107,609	106,305	107,588	50,047	108,559
Operating Income	58,060	57,436	48,898	40,536	(11,680)	38,943
Depreciation	9,215	8,802	8,589	12,138	7,829	13,913
Amortization	1,915	13,983	15,043	14,325	7,647	14,211
Gain (Loss) on Disposal	131	196	(874)	(7)	(4)	(6)
Other Expenses	44,644	47,741	53,821	61,571	33,123	68,632
<b>Net Income</b>	<b>2,155</b>	<b>(13,286)</b>	<b>(27,681)</b>	<b>(47,490)</b>	<b>(60,275)</b>	<b>(57,807)</b>
Add Back - Interest and Taxes	43,666	47,761	52,850	59,634	33,125	68,512
<b>EBIT</b>	<b>45,821</b>	<b>34,475</b>	<b>25,169</b>	<b>12,143</b>	<b>(27,149)</b>	<b>10,705</b>
Add Back - D&A	11,130	23,227	24,086	26,915	15,716	28,659
<b>EBITDA</b>	<b>56,952</b>	<b>57,703</b>	<b>49,255</b>	<b>39,058</b>	<b>(11,434)</b>	<b>39,364</b>
Adjustments	3,784	1,826	10,649	5,780	4,522	6,272
<b>Adjusted EBITDA</b>	<b>60,736</b>	<b>59,528</b>	<b>59,904</b>	<b>44,839</b>	<b>(6,912)</b>	<b>45,636</b>

\* Forecast includes 6 months actuals (February YTD) plus 6 months budget for the remainder of 2019





american achievement corporation

**Media Contact:**

Amanda Reynolds

Director, Corporate Communications

[amanda.reynolds@balfour.com](mailto:amanda.reynolds@balfour.com)

214-819-8401

## **American Achievement Corporation and Iconic Group announce merger to transform the graduation industry**

*Two industry leaders will have strong exposure to growing graduation categories and an ability to reach consumers across virtually all channels*

DALLAS, TX – May 20, 2019 – American Achievement Corporation®, the preeminent manufacturer and digital retailer of customized products including yearbooks, jewelry, photo and print products, graduation supplies and apparel, has completed its merger with Iconic Group®, the leader in graduation photography in the United States. This creates an unparalleled product and service offering in the scholastic and collegiate graduation market. The merger closed on May 7, 2019.

American Achievement Corporation® (AAC) is the parent company of the highly recognizable brands Balfour®, ArtCarved®, Keepsake®, Taylor Publishing® and Gaspard® Cap and Gowns. With recent investments in process innovation and technology, Balfour leads the industry in new product development and user-first software to better serve the needs of its customers.

AAC's investors were initially drawn to Iconic Group® because of its position as the dominant provider of photography services at college and university graduations. Iconic Group's track record of flawless execution and innovation is unrivaled in the industry. The company, operating under the GradImages®, University Photo® and MarathonFoto® brands, provides professional photography to more than 2,500 colleges and universities each year.

"Together we are better positioned to serve our clients and deliver the best of both companies' talents, systems and processes," said Bob Myers, President and CEO of American Achievement Corporation. "With the ability to cross-sell, we're creating a graduation experience for schools, students and families alike that is unmatched in the industry."

The highly complementary combination will leverage the increased resources of the two companies and provide a best-in-class experience for graduation photography, products and services that celebrate the most memorable moments in a student's life.

"The addition of graduation and on-campus photography to AAC's already robust lineup of products and services is a win for both brands' client base," Denise Conroy, CEO of Iconic Group said. "Iconic Group's attractive business model fits very well with AAC. Together, we share a purpose-driven culture and client-first mentality."

The combined company will be headquartered in Dallas, while continuing Iconic Group's operations in Atlanta and Tallahassee, FL.

**ABOUT AAC:** For more than a century, American Achievement Corporation® has celebrated the most meaningful moments in students' lives. Operating under the brands Balfour®, ArtCarved®, Keepsake®, Taylor Publishing® and Gaspard® Cap and Gowns, it leads the industry with products like class rings, yearbooks, letter jackets and graduation regalia. With recent investments in digital technology and product innovation, AAC is innovating tradition with best-in-class software for yearbooks, 3D printing for rings and school enrichment programs aimed at positively affecting campus culture. For more information, visit [www.balfour.com](http://www.balfour.com).

**ABOUT ICONIC GROUP, INC.:**

Iconic Group is the undisputed leader in professional commencement photography. The company takes over 50 million images annually at over 2,500 colleges, universities and high schools. Operating under the GradImages®, University Photo® and MarathonFoto® brands, Iconic Group is renowned for flawless execution through its unparalleled network of photographers and leading-edge technology. The company is the best in the business at handling some of the largest and most complex graduation events. For more information, visit [www.iconicgroup.com](http://www.iconicgroup.com).





american achievement corporation

**Media Contact:**

Amanda Reynolds

Director, Corporate Communications

[amanda.reynolds@balfour.com](mailto:amanda.reynolds@balfour.com)

214-819-8401

**American Achievement Corporation Names Robert Myers President And CEO**  
*Industry Veteran Brings Over 30 Years of Merchandise and Retail Experience*  
**Steven Parr to Assume Role of Executive Chairman**

AUSTIN, Texas, March 8, 2016 /PRNewswire/ -- Leading yearbook and affinity company American Achievement Corporation ("AAC") ("the Company"), which operates primarily under the Balfour brand, today announced it has named Robert "Bob" Myers as President and Chief Executive Officer, effective March 14, 2016. Current President and Chief Executive Officer, Steven Parr, will assume the role of Executive Chairman of the Board of AAC and will work closely with Mr. Myers through a transition phase.

Mr. Myers, 51, has over 30 years of experience in the merchandise and retail industries, with a focus on sales, marketing, product development and omni-channel distribution strategies. He most recently served as President and Chief Executive Officer of Sheplers, a Dallas-based western lifestyle company with 25 retail locations across the United States and an industry-leading global e-commerce business. At AAC, Mr. Myers will lead the next phase of the Company's growth, including the enhancement of the Company's digital capabilities and the launch of its new publishing software, while further solidifying its core business driven by the Company's in-house sales force and over 300 independent sales representatives' sale of exceptional and innovative graduation, achievement and affinity products to schools around the country.

Mr. Parr stated, "Bob is a seasoned and extraordinarily talented executive who has a proven ability to successfully grow unique businesses by enhancing sales, marketing and product development, developing digital platforms and omni-channel strategies. Bob's skills, insights and vision make him the ideal person to lead AAC on our exciting path ahead, and I look forward to continuing to work closely with him and the Board to execute strategic initiatives that will accelerate AAC's growth prospects for the benefit of the Company's customers, partners, sales representatives and employees."

Mr. Myers stated, "I am thrilled to be joining AAC and am excited to work closely with the Company's talented staff and independent sales representatives to achieve our growth plans. Because of the well-established relationships AAC's experienced sales representatives have built with schools across the country, AAC is positioned very well in the marketplace. I am confident that with this strong foundation in place, we have tremendous opportunities to enhance our focus on providing the best products to our scholastic customers and delivering outstanding service and cutting-edge software to our publishing customers."

As CEO of Sheplers from 2010-2015, Mr. Myers drove top line sales growth and led the company's opening of 11 new stores. Prior to joining Sheplers in 2010, Mr. Myers spent nine years at QVC, where he held various senior roles in digital strategy, merchandising, marketing and business development. Most recently at QVC, Mr. Myers was Senior Vice President of QVC.com, Multi Media Platforms & Broadcast Operations & Technology, responsible for its internet business including its \$2 billion global e-commerce and mobile platform, online marketing and multi-channel initiatives. Earlier in his career, Mr. Myers held various marketing and merchandising leadership positions at J.C. Penney. Mr. Myers holds a Professional Master Certification in E-Commerce from the Southern Methodist University School of Engineering, a B.S. in Business Studies from Buffalo State University and an A.S. in Computer Science from Condie College.

**About American Achievement**

American achievement provides products that forever mark the special moments of people's lives. As the parent company of brands such as ArtCarved®, Balfour®, Keepsake® and Taylor Publishing®, American achievement's legacy is based upon the delivery of exceptional, innovative products, including class rings, yearbooks, graduation products, achievement publications and affinity jewelry through in-school and retail distribution. American achievement's products are available through a variety of distribution methods, including direct sales to students in high schools and colleges, national jewelry retailers, independent jewelry stores and mass merchandisers. For more information on American achievement, please visit the company's web site at [www.balfour.com](http://www.balfour.com).





american achievement corporation

**Media Contact:**

Amanda Reynolds  
Director, Corporate Communications  
[amanda.reynolds@balfour.com](mailto:amanda.reynolds@balfour.com)  
214-819-8401

## **American Achievement Corporation Successfully Refinances Credit Facilities**

### ***Positions Company to Optimize Next Phase of Growth***

AUSTIN, Texas, Sept. 30, 2015 /PRNewswire/ -- Leading yearbook and affinity company American Achievement Corporation ("AAC"), which operates primarily under the Balfour brand, today announced the closing of the private placement of \$467 million aggregate principal amount of new revolving credit facility, first lien term loan, senior subordinated notes and preferred stock.

The proceeds of this offering will be used to refinance the Company's existing revolving credit facility and \$365 million of 10.875% senior secured notes due in 2016. In addition, the recapitalization will allow AAC to redeem or exchange all outstanding Series A Preferred Stock at the Company's indirect parent, American Achievement Group Holding Corp., redeem certain minority holders of common stock and warrants and pay related fees and expenses.

Steven Parr, President and Chief Executive Officer of American Achievement stated, "Today's announcement is another important step forward for AAC as we continue to pursue a strategy to strengthen and diversify the business for long-term growth, both organically and through niche add-on acquisitions. Our successful refinancing follows multiple significant developments for the Company this year, including the acquisition of Gaspard, a manufacturer of graduation caps and gowns, and investments in My YearLook and TeamWorks, two digital scholastic assets that fit well with AAC's business model – all representing exciting new paths for growth."

Mr. Parr concluded, "The Company is at an important inflection point, and today's refinancing will enable us to reposition the business and execute on our strategic plans."

The Company retained Moelis & Company LLC as a financial advisor in connection with this transaction. Lowenstein Sandler LLP acted as company counsel.

#### **About American Achievement**

American achievement provides products that forever mark the special moments of people's lives. As the parent company of brands such as ArtCarved®, Balfour®, Keepsake® and Taylor Publishing®, American achievement's legacy is based upon the delivery of exceptional, innovative products, including class rings, yearbooks, graduation products, achievement publications and affinity jewelry through in-school and retail distribution. American achievement's products are available through a variety of distribution methods, including direct sales to students in high schools and colleges, national jewelry retailers, independent jewelry stores and mass merchandisers. For more information on American achievement, please visit the company's web site at [www.balfour.com](http://www.balfour.com).



## GLOBAL CONSCIOUSNESS

>> **reduce | recycle | renew**

At Balfour, we're committed to responsible practices to protect the future of our planet. Several key principles

drive our commitment to stewardship of renewable resources:

- Marketing and selling environmentally sound products
- Using only reputable suppliers and collaborating to source materials whose origins are known to be sustainable
- Creating a substantive conservation impact through the responsible management of processes, procurement of work materials and employee education
- Ensuring our customers continue to receive the best quality, functionality and price
- Encouraging employees to make a change in the community

### Renewable Resources

Balfour is committed to the promotion of renewable resource management. Our text and endsheet papers are sourced from suppliers with global certifications supporting the promotion of sustainable forest management, protection of wildlife, air and water quality.

Beyond our product initiatives, Balfour is committed to several long-standing environmental initiatives in accordance with the standard of the Environmental Protection Agency (EPA) and our facilities' State Commission on Environmental Quality (TCEQ). These include:

- |                                  |                               |
|----------------------------------|-------------------------------|
| • Pollution prevention           | • Materials management        |
| • Preventive maintenance         | • Paper goods recycling       |
| • Waste management and recycling | • Good housekeeping practices |

In the past decade, we've recycled more than **12,000 tons of paper**. In doing so, we've helped preserve nearly **200,000 trees**, **four million gallons of oil**, **75 million gallons of water**, **50 million kilowatt hours of energy** and **40,000 cubic yards of landfill space**.

We're proud of our accomplishments and ask you to join us in supporting a more environmentally conscious tradition.





LAKE WASHINGTON SCHOOL DISTRICT

Yearbook RFP #19-2384

OPENING: 3:00PM July 12, 2019

Prepared by: Kerri Kuykendall Smead

# ATTACHMENT "C"

## NON-COLLUSION AFFIDAVIT



ATTACHMENT "C"

NON-COLLUSION AFFIDAVIT

STATE OF WASHINGTON

COUNTY OF KING

The undersigned, being duly sworn, deposes and says that the person, firm, association, partnership or corporation herein named has not either directly or indirectly entered into any agreement on behalf of, any undisclosed person, partnership, company, association, organization or corporation, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in the preparation and submission of a proposal to the District for consideration in the award of a contract for the Request for Proposal described herein.

Legal Name: Kerri Kuykendall Smead

Authorized Signature: Kerri Smead

Sworn before me this 10 day of July, 2019.

Acknowledgment:

Given under my hand and seal of office this 10<sup>th</sup> day of July, 2019.

NOTARY PUBLIC in, and for the State of Washington, residing at Gratac, WA

Printed Name: Shamin Karan

My commission expires: Mar 18, 2023

SHAMIN KARAN  
Notary Public  
State of Washington  
Commission # 8045  
My Comm. Expires Mar 18, 2023



LAKE WASHINGTON SCHOOL DISTRICT

Yearbook RFP #19-2384

OPENING: 3:00PM July 12, 2019

Prepared by: Kerri Kuykendall Smead

# ATTACHMENT “D” REFERENCES AND RESUME



ATTACHMENT "D"

REFERENCES

Provide a listing of at least three (3) references, preferably public school districts located in the State of Washington with comparable size/volume, for which the company is currently providing the same or substantial similar products/services

1. Customer Name: Northshore School Dist  
Location: Inglemoor High School  
Contact Name: Zane Mills  
Title: Yearbook Adviser  
Telephone: zmills@nsd.org 425-318-2689
2. Customer Name: Arlington High School ↗  
Location: Arlington School District ↘  
Contact Name: Anne Hayman  
Title: Yearbook Adviser  
Telephone: ahayman@asd.wednet.edu  
425-876-6495
3. Customer Name: Bellevue School District  
Location: Interlake High School  
Contact Name: Megan Bennett  
Title: Yearbook Adviser  
Telephone: bennettm@bsd405.org  
425-785-4418



## LOCAL SERVICE



KERRI SMEAD  
PUGET SOUND  
YEARBOOK SERVICES

13748 SE 172nd St  
Renton WA 98058

tel:

425.496.8090

cell:

425.503.7016

e-mail:

kerrismead@comcast.net

In an age of fast-moving technology, a personal approach to service makes Balfour Yearbooks your ideal publishing partner. This is reflected both in our publishing plant representatives, technology support and in personal visits I will make to each school. With nearly 25 years of yearbook experience, I understand what it takes to build a great book. For each of my customers, I'm committed to providing:

- Production, design and computer workshops for you and/or your students - on site in the fall at YOUR school to meet YOUR needs as an adviser and as a whole staff
- Layout, copywriting and design expertise
- Photography expertise, including digital technology
- All production and teaching materials necessary to complete your yearbook
- A comprehensive marketing, advertising and merchandising strategy to increase your yearbook and ad revenues
- Regular budget reviews to keep yearbook financing on track - we have a "Your Budget Worksheet is Your Bill" policy so there are no surprises
- Personal proofreading and inspection of each copy shipment before it is sent to our publishing plant
- Visits, at minimum monthly, but, to meet YOUR needs
- I will help your staff build the book of their dreams on time and on budget!

I recognize that advising is challenging and strive to return phone calls, return emails, provide on-site visits, local workshops, custom trainings and budget updates to meet each school's individual needs. I am able to meet monthly or several times a month, based upon need, to help an adviser and staff build a successful book. I can also work directly on a StudioWorks, MyYear, Encore or with BalfourGO, InDesign project from my office, if the need arises.



## PRODUCTION FACILITY SERVICE TEAM



**CATHY  
SIMONEAUX**

telephone:

800.947.0408

e-mail:

Catherine.Simoneaux@  
balfour.com

In our publishing plant, a manufacturing team will handle your publication's pages from beginning to end. Each team has a close working relationship, ensuring your pages are handled with the highest care for quality and consistency, allowing for quick turnaround of proofs.

Assisting you from within the plant is Account Executive, Cathy Simoneaux. She will oversee trouble-free production of each page of your yearbook, answer your questions and guide your book thru the plant. With over 25 years of experience, Cathy has your back!

- Track and oversee the production of your book in our Dallas print facility
- Coordinate proof returns
- Answer questions and solve technical issues
- Provide tech support
- Coordinate shipping
- Double-check proofs
- Confirm copy receipt and signature completion



**STUART HAGEN**

telephone:

800.947.0510

e-mail:

Stuart.Hagen@  
balfour.com

Stuart Hagen from our Technology Team is on-call and ready to answer InDesign, Photoshop, StudioWorks and Technology questions. Like our customer service team, our technology team means better communication and allows us to respond quickly to your questions and needs. Our entire customer service staff receives extensive training in all aspects of yearbook production and are ready to respond whenever you need them.

- On call to answer tech questions about InDesign, Photoshop, Bridge, Illustrator and StudioWorks
- Assist with Windows and Mac technical issues
- Provide instruction and support on software installation
- Provide remote tech support with Web-Ex right on your school's computer



13748 SE 172<sup>nd</sup> St  
Renton, WA 98058

425-503-7016  
kerrismead@comcast.net

## Kerri Smead

<b>Objective</b>	Provide the service and publishing assistance in the continued development and publication of award winning books, on budget and on time.		
<b>Experience</b>	1999-current	Balfour Yearbooks	Renton, WA
	<b>Yearbook Sales and Services Representative</b>		
	<ul style="list-style-type: none"> <li>▪ Work with elementary – high schools in the Puget Sound helping them build their yearbooks – on time and on budget</li> <li>▪ Provide yearly summer workshop for students and advisers</li> <li>▪ Present at national sales conferences</li> </ul>		
	1995-1999	Kuykendall Inc., General Contractor	Fairbanks, AK
	<b>Vice President</b>		
	<ul style="list-style-type: none"> <li>▪ Purchasing, hiring, training, payroll, accounting</li> <li>▪ Worked with customers to help them choose the options packages for their construction projects</li> <li>▪ Provided detailed billing updates to customers and banks</li> <li>▪ Bidding and Contract negotiations</li> </ul>		
	1993-1995	Corvallis Gazette-Times	Corvallis, OR
	<b>Retail Advertising Sales Rep</b>		
	<ul style="list-style-type: none"> <li>▪ Worked with local businesses to sell ad space in the daily newspaper</li> <li>▪ Consistently met sales goals and increased revenues</li> <li>▪ Designed ads, marketing programs and promotional pieces for customers</li> </ul>		
<b>Education</b>	1985-1992	Oregon State University	Corvallis, OR
	<ul style="list-style-type: none"> <li>▪ Field of study: Journalism and Print media, Housing Design</li> <li>▪ 1988-89 OSU Beaver Yearbook, Editor-in-Chief</li> <li>▪ 1989-90 OSU Daily Barometer, Advertising Director</li> </ul>		
<b>Interests</b>	Gardening, sailing, stained glass and travel.		
<b>Awards</b>	<p>2002 Balfour Yearbook, Service Representative of the Year</p> <p>2002 and 2010 Balfour Yearbook, Office of the Year</p> <p>2001, 2002, 2003, 2005, 2007, 2010 Century Award for Excellence in Service</p>		



**CATHERINE A. SIMONEAUX**

1601 Melrose Circle  
Garland, Texas 75042

972.276.0994  
[cascatax@hotmail.com](mailto:cascatax@hotmail.com)

*Customer focused consultant with demonstrated expertise in the development, implementation & instruction of desktop publishing software emphasizing customer needs and the publisher's operational and project objectives. Proven track record of building strong relationships at all levels of an organization. Ability to speak effectively in front of groups – customers and colleagues*

**ACCOMPLISHMENTS**

- Support Representative requested most on calls, through emails, and for training seminars
- Sales Force's first choice for consulting with potential customers
- Often implored to moderate new committees/focus groups
- Numerous printed personal thanks in school yearbooks
- Wrote majority of articles for Tech Support area of company website

**EXPERIENCE****Balfour|Taylor Yearbooks, Dallas, TX****1993-Present****Account Executive (2007-Current)**

- Provide support and service primarily to customers and sales persons publishing yearbooks.
- Keep yearbooks moving smoothly through all the processes of production.
- Act as a liaison for the school and sales persons when issues arise and decisions need to be made in plant.

**Customer Software Support Consultant (1998-2007)**

- Provide technical support and customer service to internal and external customers (including sales persons) using proprietary and commercial desktop publishing software for the production of yearbooks via testing, evaluating, documenting, training and troubleshooting on-site and at other locations.
- Perform problem solving techniques requiring ingenuity, creativity, independent action and decisions regarding unknown variables and inexperienced users to resolve difficult and complex computer issues.
- Test /evaluate new releases of company software, including plug-ins for commercial software, with multiple operating systems and environments while acting as a liaison between users, programmers, developers and Marketing in the creation and revision based on user requirements.
- Wrote, proofread and modify all computer related user materials written and provided by the company to insure information is accurate and customer friendly.
- Train coworkers and new hires

**Composition Marker I & II (1993-1998)**

- Selected/assigned to leadership roles, problem-solving committees, quality control teams and special projects. Liaison between programming and manufacturing in the development of yearbook specific software and production methods.
- Trained new hires and reviewed seasoned employees for quality and correctness while acting as a resource to aid coworkers. Wrote materials regarding proper application procedures.
- Prepared daily reports for supervisor regarding work flow, hours and budget. Proofread supervisory memos and presentations.

**BOX OFFICE VIDEO SUPERSTORE, Plano, TX****1988-1991****Manager & Customer Service Associate**

- Worked customer service desk and register, handled transactions, maintained store database.
- Opened and closed store, set up and closed out cash drawers daily, ran database backups and daily reports.
- Inventoried all departments to maintain proper placement and availability of movie titles, comparison shopped for titles and ordered stock.
- Prepared employee work schedules and supervised associates in their day-to-day duties.

**EDUCATION / TRAINING**

The University of North Texas (1989-1993) - Bachelor of Arts/English, Classic Learning Core Scholar

**SKILLS**

Windows 95, 98, 2000, NT, ME, XP; Macintosh OS 8 – OS X; MS Word, Excel, PowerPoint, Outlook, Exchange, Acrobat, PhotoShop, PageMaker, QuarkXPress, InDesign, WebEx, Excellent Customer Service Skills, Quick to Learn, Excellent Phone Skills and Superior Writing Skills



**Stuart Hagen**

6301 Duckcreek Dr Apt1377  
Garland, TX 75043

**Tech Support****2005 - Present****Balfour Yearbooks**

- Tech support of BalfourTools and StudioWorks.
- General support of Adobe products and other graphic software in means of yearbook design.
- Testing new software plugins for latest version of Balfour plug-ins.
- Teaching and training in all Adobe products for schools and reps.
- Advanced knowledge of listed software and hardware.
  - Adobe InDesign
  - Adobe Illustrator
  - Adobe Photoshop
  - Adobe Pagemaker
  - Adobe Bridge
  - Adobe Acrobat
- PC and Mac Operating Systems
- PC hardware including scanners, printers, and other peripheral devices

**Education:**

- 80+ hours of Graphic Design and Computer Animation courses
- 5+ years experience in graphics field
- I enjoy helping our customer's reach their goals and assisting them in creating memories that will last forever.



## REFERENCES



Northshore School District  
Inglemoor High School  
Zane Mills- Adviser  
[zmills@nsd.org](mailto:zmills@nsd.org)

Northshore School District  
Bothell High School  
Jolene Conklin- Adviser  
[jconklin@nsd.org](mailto:jconklin@nsd.org)

Bellevue School District  
Tillicum Middle School  
David Jensen - Adviser  
[jensenda@bsd405.org](mailto:jensenda@bsd405.org)

Oak Harbor School District  
Oak Harbor High School  
Jana Jansen- Adviser  
[jdjansen@ohsd.net](mailto:jdjansen@ohsd.net)

Enumclaw School District  
Enumclaw High School  
Victor Wallace - Adviser  
[Victor\\_Wallace@enumclaw.wednet.edu](mailto:Victor_Wallace@enumclaw.wednet.edu)

Kent School District  
Kentlake High School  
Suzanne Rychlik- Adviser  
[Suzanne.Rychlik@kent.k12.wa.us](mailto:Suzanne.Rychlik@kent.k12.wa.us)

Bellevue School District  
Interlake High School  
Megan Bennett - Adviser  
[bennettm@bsd405.org](mailto:bennettm@bsd405.org)

Yakima School District  
Davis High School  
Cindy Hunter - Adviser  
[Hunter.Cynthia@yakimaschools.org](mailto:Hunter.Cynthia@yakimaschools.org)



**Inglemoor High School**

Vicki Sherwood, Principal  
Kristin Rose, Assistant Principal  
Jon Stern, Assistant Principal  
Lance Gatter, Athletic Director  
Elisabeth Kowalski, Activities Coord.

15500 Simonds Road NE  
Kenmore, WA 98028-4430

(425) 408-7200



June 16, 2017

Dear Selection Committee,

I am pleased to write a letter of recommendation for Kerri Smead. I have worked with Kerri for the past seven years. Prior to that time, I was not the yearbook adviser, but I knew Kerri from her work with the previous yearbook adviser. She has won the bid for our district overseeing all of our books for all of those years. My history with Kerri has taught me that she is easy to work with and she provides knowledgeable and professional support for the publication of our books.

Kerri is committed to providing a stress-free experience for schools. We dream big for our book and then she brings the book in on time and on budget. There are no hidden fees and no late fees, even when we struggle to meet deadlines. When we have had difficulty meeting deadlines, she has still consistently made our book get delivered on time.

Balfour is very easy to work with allowing direct contact with our account executive by phone during office hours. Our account executive also responds immediately to emails. When I have sent emails after office hours during late night work sessions, I find her replies in my inbox the next morning. The publisher double checks all of our work helping to find and correct our errors.

At Inglemoor, we produce a nationally ranked book that has earned the All Washington Award from the Washington Journalism Education Association. We frequently think of an idea that has never been done before (color changing cover, reflective materials, upside down books) and Kerri embraces our dreams, manages the book in a calm way always finds a solution for our ideas.

For these reasons, I have no reservations in giving Kerri Smead my highest recommendation.

Sincerely,

Zane Mills





To Whom It May Concern:

Kerri Kuykendall has been my Balfour|Taylor yearbook representative since the 2000-01 school year. She has made the process of building a yearbook as painless and pleasant as humanly possible. I always trust that our book is a priority of Kerri's. She answers questions quickly and easily. Kerri is not only a knowledgeable yearbook representative, but she is also very personable and approachable. My kids love her and are excited to see her coming to visit. Students find her a good resource and frequently talk to her about what they would like to see happen next year and ask the same questions of her that they would ask of me.

When Kerri bids our contract, she pays attention to what we find important in a yearbook publisher and the technology we want to utilize. She has made it a reality for us to test the technology even if it's not widely available to all Balfour|Taylor customers. She is able to neutralize my own frustrations and troubles, and she has put me in touch with specific people in the plant and related to Balfour|Taylor that can provide assistance. For example, when I chose to undertake a book design that involves a lot of Photoshop (a program which I am pretty unskilled in), she made sure to take a day and sit down with me to help me figure out the simplest way to accomplish my goals. She also made sure I had phone numbers and email addresses for other people more practiced in Photoshop that could also answer my "distress" calls.

Kerri has made it a priority to simply my life and make my job as yearbook adviser easier. She asks what I need and shares good ideas between her advisers. This year I was trying to figure out a way to do a semester assessment in order to figure out where the trouble spots were; she sought input from curriculum advisers with Balfour|Taylor, and she called me with what other advisers in the area do to accomplish the same thing. Whenever I am feeling particularly frustrated or frazzled with my situation (technological or staff), Kerri is able to quickly talk me back into sanity and remind me that it is not a life or death situation, and we will fix it. She visits whenever I need her to, and she helps me with whatever my problems are even if it's simply a five-minute fix though she has just driven an hour.

Kerri also provides opportunities and ideas to improve the overall quality of my book. She is continually talking about resources and ways to change things in our book and improve the look. She has helped us to purchase better equipment to improve the photography and design throughout the book. Kerri, and Balfour|Taylor offer what's called an Intensity Workshop. This is a chance to show your book to journalism Guru's and see what you need to do to improve your chances at being a national award-winning yearbook. I was unable to attend the Intensity Workshop one year because my husband was on strike. Kerri took my book and made sure I had a review of the book before we really spent time creating the book. She provides spring and summer training as well as some editor/adviser specific opportunities. I always leave with new ideas as well as a fresh outlook on my life as a yearbook adviser. My students leave energized and ready to embark on the yearbook adventure.

I began my career here in Arlington with a different yearbook publisher. It took one yearbook "season" to switch to Balfour|Taylor Yearbook, and I have had no regrets. The customer service provided by every person who works on our book is phenomenal. I know that I have the whole plant working to make sure that our book is published on time and properly. They contact me with questions and concerns; they work with my technological traumas and are incredibly helpful and friendly when I call with the smallest and simplest of questions. I will not work with any other publisher.

I can go on and on about Kerri Kuykendall and Balfour|Taylor, but I won't. Please don't hesitate to contact me with any questions, comments, or concerns.

Sincerely,

*Anne M. Hayman*

Anne M. Hayman  
Arlington High School  
(360) 618-6300 ext 3236  
Anne\_Hayman@asd.wednet.edu



## REFERENCES

Victor A. Wallace  
Enumclaw High School  
1088 Pioneer St.  
Enumclaw, WA 99022

To Whom It May Concern:

I have been a publications adviser for almost 25 years and a yearbook adviser for half of those. I've been to dozens of national conferences and state workshops. It is a challenging job sometimes, and I read at one point that the average career as a publications adviser is a little over three years. So I can speak from experience when I say that Kerri Smead is the best yearbook representative that I know of.

She has been a driving force in the continued success of the yearbook I advise. She is immediately responsive to any question I have, and knows how to inspire my students to work harder, learn more and meet their deadlines.

With Kerri's help, Enumclaw has earned a national reputation for having creative yearbook designs and themes, especially on our covers. Kerri is always on the lookout for new designs, and can find a way to make almost any concept become a reality. She can track down obscure manufacturers in far away corners of the globe (or even your own backyard).

I can honestly say that I doubt I would still be a yearbook adviser without her support. I love the job, it is my favorite part of teaching, but it takes another level of support to weather the challenges. Kerri delivers.

Sincerely,

Victor Wallace  
253-315-0079



## REFERENCES

16245 NE 24th Street  
Bellevue, WA 98008

Yearbook Advisor,

I am writing this letter to recommend the services of Balfour|Taylor Yearbooks and most especially their local representative, Kerri Kuykendall. I have been working with Kerri and Balfour|Taylor for five years now and I have found their services to be consistently above my expectations. One of the most prominent reasons for our satisfaction with the work we do with Taylor is the effort, creativity, support and availability of our representative, Kerri.

Kerri is an enthusiastic cheerleader who is always ready to stop by the classroom to solve a problem or just hear you out after one of the frustrating experiences that we often face as yearbook advisors. Kerri is knowledgeable and creative enough to offer real, effective, and satisfying solutions to a variety of questions or challenges. When our staff came up with a theme that involved attaching dog tags to each book as name plates, Kerri searched out a vendor who would produce the dog tags to our specifications and most importantly our budget, she drove around town buying samples of every type of glue one could think of and tested them out for us so we had an efficient and effective way to attach the dog tags, and she was available to help my staff do the work to make their idea a reality. She also has the experience and the willingness to let you know when an idea won't fly. She outlines the potential pitfalls, but always leaves the decision to the advisor and staff and will make every effort to make any idea work. Kerri also possesses extensive technical knowledge and has been an invaluable help to me as I transition from an old school advisor who produced books in the days of typewriters and cropping tools to one who utilizes the many technical tools available. One of those tools that we find very valuable is the Online StudioWorks program we use from Balfour|Taylor and Kerri is an excellent resource for us as we learn and master it.

She understands well each of the unique constituents, concerns, and challenges at her various schools. She helps us create a book packed with visual appeal and wow factor on our limited budget. Our school has recently transitioned from producing the yearbook as a club to a class. Kerri has helped enormously with the challenges of that transition. She makes sure we stay on budget and that we complete our book on time (even if we are not consistently on deadline). Kerri creates a strong relationship with students and helps me achieve my goals as an advisor.

We find working with the Balfour|Taylor Yearbook company rewarding as well. The representatives from the plant are easy to work with and knowledgeable. The final product is of a quality that our staff is very proud of and our student body finds meets or exceeds their expectations. They go the extra mile to get your book to you on time. They provide local training opportunities such as a spring advisor workshop and a summer staff workshop facilitated by Kerri who does a great job of bringing in folks who have much experience and creativity to share. There are also many other resources in print and online available to me as a Balfour|Taylor customer.

I highly recommend Balfour|Taylor and especially Kerri to you for your yearbook needs.

Sincerely,

Megan Bennett  
Advisor, Interlake High School  
Bellevue, WA





12111 NE First Street, Bellevue, Washington 98005 / P.O. Box 90010, Bellevue, Washington 98009-9010

February 10, 2017

To Whom It May Concern:

This letter will serve as my enthusiastic recommendation of Kerri Smead and the whole Balfour Publishing team for your yearbook needs. Kerri has served Tillicum Middle School as our local representative for 18 years; I have worked with her as Tillicum's Yearbook Advisor for the last seven years. During that time, Kerri has always been patient, honest, efficient, and helpful in every situation. Even in moments of crisis, when my students and I have occasionally missed a deadline, she has always managed to get our yearbooks delivered on time. More importantly, on a day-to-day basis she is always accessible for whatever my students and I need. From suggesting theme and cover ideas to our students, to working with me to use her years of experience to recommend tips and tricks that make my job as advisor easier, Kerri has been a huge part of the popular and professional-looking yearbooks Tillicum produces year after year, despite our Yearbook Club meeting only one hour per week. Kerri is always willing to come to our classroom and teach a lesson to my students on whatever we need – photo composition, how to create an attractive layout, how to use StudioWorks (Balfour's outstanding desktop-publishing app), or how to write interesting copy. (When the information comes from a professional like Kerri, students just seem to take it much more seriously than when it comes from their English teacher.)

For the last seven years, no matter what problem I've thrown at Kerri and her team (including Account Executive Cathy Simoneaux and the entire Tech Support team), they've never failed to do whatever was necessary to ensure that our problem was fixed and that we received our yearbook the way we wanted it, when we needed it. Even the year we discovered some student mischief requiring an entire section to be reprinted just before it was due to be shipped, they still worked their magic and delivered our books the day before they needed to be distributed!

Balfour itself also provides a great foundation for a yearbook. As I mentioned, the StudioWorks app makes even sophisticated layouts simple enough for middle-schoolers. Balfour's support materials (sales flyers, promotional posters, production aids, etc.) are all top-quality and make students feel like real professionals who are creating and publishing the book – which they are!

I worked with another yearbook publisher at my previous school, and working with Kerri has been the difference between night and day. I cannot recommend her and Balfour any more highly than to say that I plan to stay with them permanently.

Sincerely yours,

A handwritten signature in blue ink, appearing to read "David Jensen", written over a light blue horizontal line.

David Jensen  
Yearbook Advisor  
Tillicum Middle School



LAKE WASHINGTON SCHOOL DISTRICT

Yearbook RFP #19-2384

OPENING: 3:00PM July 12, 2019

Prepared by: Kerri Kuykendall Smead

# ATTACHMENT “E” PRICE LIST



LAKE WASHINGTON SCHOOL DISTRICT

Yearbook RFP #19-2384

OPENING: 3:00PM July 12, 2019

Prepared by: Kerri Kuykendall Smead

# ATTACHMENT "F" QUESTIONNAIRE & MANAGEMENT PLAN





ATTACHMENT "F"

QUESTIONNAIRE

REQUIREMENTS:

Contractor has read and understands the requirements of section 3.11 ("Conflict of Interest"):

Yes X No \_\_\_\_\_

Contractor will allow audits per section 3.09: Yes X No \_\_\_\_\_

Contractor has provided in his proposal the **mandatory information** required under section 2.02 of the RFP.

Yes X No \_\_\_\_\_

EMPLOYEE TRAINING & SAFETY PROGRAM:

Contractor has a training and safety program? Yes X No \_\_\_\_\_

SUBCONTRACTOR(S):

If planning to use any subcontractor(s): Yes \_\_\_\_\_ No X

If yes, the subcontractor(s) must be approved by the District.

1. Subcontractor company name: \_\_\_\_\_

2. Subcontractor company name: \_\_\_\_\_

3. Subcontractor company name: \_\_\_\_\_

PRICING:

Complete Price List is enclosed: Yes X No \_\_\_\_\_

INSURANCE:

Signed Certificate of Insurance and endorsement will be supplied to LWSD for District approval:

Yes X No \_\_\_\_\_



EARLY PAYMENT DISCOUNT:

Contractor is offering an early payment discount (per section 3.16):

Yes X No \_\_\_\_\_ 2% reduction in base price  
for all schools who pay in  
full 21 days from date of  
PURCHASING CARD ACCEPTANCE: Invoicing. (16)

Contractor accepts the use of purchasing cards (per section 3.17):

Yes X No \_\_\_\_\_



# COMMUNICATION & RESPONSIBILITIES

## COMMUNICATION

Your service team is available 24/7 to assist you in the production of your book. Calls, emails or text messages will be returned as soon as possible and the goal is in less than 24 hours. Kerri, customer service reps in the plant and your tech rep are all on-call for computer, design and logistical questions.

## STAFF AND ADVISER RESPONSIBILITIES

Your Balfour service team exists to help you build the book you dream about.

The staff and adviser are responsible for creating a cover, endsheets and content pages that reflect those dreams. The rep and adviser will talk each fall and set deadline TOGETHER that will ensure an on time delivery. It is the responsibility of the staff and adviser to work to meet those deadlines. The adviser needs to communicate to the rep as soon as possible if problems to arise that will delay a shipment. The rep will work with the plant to reassign deadlines so that the delivery is not jeopardized.

It is the responsibility of the staff and adviser to turn in pages to the plant that are as complete as possible. To be aware that proofing is not editing and to the best of their ability submit pages that are finished. Doing so will help the school with timely return of proofs.

It is the responsibility of all parties; rep, adviser, staff and plant to communicate frequently and clearly to produce a quality product on time and on budget.

## REP RESPONSIBILITIES

It is the reps responsibility to assist with software installation, provide on site and workshop training, to do a budget and NOT allow the school to go over that budget. The rep will act as the liaison with the plant and oversee the book's production. The rep will answer emails, phone calls and text messages ASAP. The rep is responsible for honest and frequent communication. Your local, plant and tech reps are your TEAM in producing a quality book and will do everything in their power to help the school achieve that goal.



# GUARANTEE/WARRANTY

## THE BALFOUR YEARBOOKS BRAND PROMISE

Balfour recognizes that advising is a challenging endeavor, but personalized assistance along the way can make all the difference. With over 100 years experience helping advisers like you produce an extraordinary yearbook, every Balfour employee stands ready to deliver the professional guidance you need to make your publication a complete success! We promise to continuously offer the highest-quality customer care, most expert advice and the most powerful, easy-to-use publishing tools available, and these services will always be priced affordably. At Balfour Yearbooks, helping you publish a yearbook your school will be proud of is our highest priority!

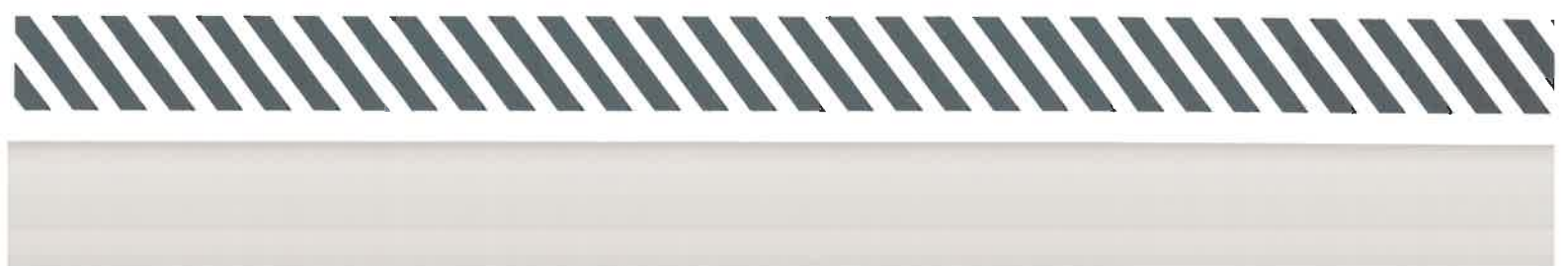
## BUDGET

Balfour has a “Your Budget Worksheet is Your Bill” policy. What this means is that each fall we (adviser and rep) sit down and review the bid and budget. We look at the printing costs, any additional items the school wants, revenues earned by the school and compile a complete budget.

Both the adviser and the rep sign the worksheet and each take a copy. The bill in June will be **EXACTLY** what is on the budget sheet and most times the budget sheet reflects the bid entirely. The only change would/could occur if a school decides to add/deduct items from their book. In that instance we do an update or another budget sheet. With Balfour Yearbooks there are no hidden costs or surprises at billing.

## DELIVERY SCHEDULE

Each fall the adviser and rep will meet to set deadlines that meet the school's distribution plans. If deadlines are met the book will deliver on, or before, the date we have agreed upon. Days in transit are all taken into consideration when setting up the deadlines so that everyone is successful!





# REFUND POLICY

## REPAIR/REFUND POLICY

Everyone at Balfour strives to build the best possible book for our customers. In the unlikely event a situation should occur where the customer is less than 100% satisfied we will immediately work to resolve the problem. Solutions might involve: reprinting, repair, crack/peel stickers, a supplement or some other creative solution. Our first goal is to have a book in the hands of the students on distribution day. If still necessary we would also work with the school on an equitable refund or credit towards the following year's book. All negotiation is done with the adviser and principal so that all parties are happy.

## EXTRAS AND RETURNS

Each year the rep and adviser will do a budget and set specifications. After those are set the Accounts Receivable department in Dallas will send out 2 deposit statements, one due in December and the other due in March. The final invoice will arrive shortly after the books and will include any deposit payments or credits. The invoice will also show a small percentage of overs, books shipped to assure a full order is achieved. Sometimes in shipping damage can occur. These extra books are to first cover any books damaged in shipping. Then, if any extras are left they are for you to sell. If you sell them you are charged the per book additional price. If you don't sell them then the rep will pick them up and credit you. With permission the extra books are utilized as samples to show to share with other schools. After the final bill you will have 60 days to return any overs and make your payments. Beginning at 90 days, following the invoicing, interest can begin to accrue at 1.5% per month on any unpaid balances. Our first desire is to work WITH the customer so if these standard policies are not acceptable please let us know and we can work with the school on an acceptable schedule.



## DEADLINES

Each Fall the adviser and rep work **with** the district calendar, yearbook ladder, distribution dates, theme plans and production needs to build a custom deadline schedule that meets YOUR needs.

- Final deadline 5-6 weeks from delivery for Middle School's
- Final deadline 5-8 weeks from delivery for High School's
- No signature requirements on submissions
- Random DPS's can be submitted to meet page-count deadlines
- No penalty for missed deadlines
- Late submissions can be made up
- We work WITH the school to assure an on time delivery!



### **NO MISSED DEADLINE FEE! CUSTOM DEADLINES TO MEET YOUR NEEDS.**

Each fall we will set deadlines together to meet the needs of the school, staff and production. An example of a deadline schedule *might* be: 20% of pages due Dec 20th, Jan 20th, Feb 20th, March 20th and April 20th.

*Dates are flexible to meet your needs.*





## INCLUSIVE SUPPLIES

Following is a partial list of items provided **FREE** of charge to help you build your yearbook.

Software/plugins & instruction manual  
School supply order forms  
Ad contracts  
Senior Parent Ad mailers  
Classic Croppers  
Type Poster  
Photo ID stickers  
Disc/CD mailing envelopes  
Disc labels  
Yearbook deadline packing lists  
Wall ladder diagram  
Sample signature  
Yearbook Organizer  
Yearbook Yearbook  
High Design Brochure  
Post-it Notes  
Cropping Pencils  
#2 pencils and pens  
Computer Cyber-buddy note pad  
Merchandising Catalog

Receipt books  
Summit Sales program and instructions  
Rough draft forms  
Mounting board  
Cover art board  
Photo/page envelopes  
Mailing envelopes  
Prepaid FedEx forms  
Software plugins or Ed packet  
Yearbook Marketing Guide  
“How to Take Great Photos” book  
“Digital Photography Made Easy” book  
Adobe Classroom in a book for the  
Adobe program you are running  
Wall calendar  
Desk blotter/calendar  
Staff Press-pass lanyards  
Common Core-Aligned Curriculum Guide  
And much more.....

**FREE &  
INCLUSIVE**



## PRODUCTION KIT SUPPLIES

The **PLANNING KIT** is delivered in the spring, after the previous year's final deadline. The Planning Kit includes materials to help organize your staff and begin planning for the next year's book, theme and content. Included in the Planning Kit are a Getting Started Guide, planning ladder diagrams, planning calendars, an adviser/editor yearbook organizer, staff recruitment resources, font guide, Balfour Squares (Balfour's staff training worksheets) and a copy of the Yearbook Yearbook (300+ page design and inspiration showcase).

Planning Gear Kit Tote – 1  
 Planning Gear Shipper – 1  
 Planning Gear Welcome & Tip Sheet - 1  
 Balfour Font Guide - 1  
 Yearbook Yearbook – 1  
 Yearbook Organizer -1  
 Planning Wall Calendar – 1  
 Ladder Diagram, Wall – 1  
 simplyCreate Brochure – 1  
 Balfour Squares, Samples w/Wrapper - 1  
 Staff Recruitment Posters, set of 2 – 1  
 Balfour Micro Fiber Bag – 1  
 Post It Note 2.75 x 3 – 1  
 Stylus Pen – 1  
 You're In The YRBK Post It – 1

In late summer, a **PRODUCTION KIT** will arrive containing marketing, reference and production tools to use in the production and promotion of your yearbook. The Production Kit is packaged in a convenient magazine rack-style holder to allow you to keep your yearbook materials stored but accessible from any shelf. It includes sample signatures, an adviser guide, deadline planner/poster, cover idea poster, a starter supply of marketing materials (sales posters, window clings, table tents), color guides and user guides for the publishing software you elect to use to prep and submit your pages.

Production Gear Shipper Box – 1  
 Magazine/Shelf Rack – 1  
 Production Gear Tip Sheet – 1  
 Studio Balfour Quick Start – 1  
 BAL4.TV Flyer - 1  
 TeamWorks Fundraising Flyer – 1  
 Yearbook Marketing Supplies Catalog – 1  
 Yearbook Padfolio - 1  
 Nameplate Order Form -1 sample  
 Namestamp Order Form -1 sample  
 Ad Contract - 1 sample  
 Sales Progress Chart - 1  
 Poster, Yearbook Cover Inspiration - 1  
 Ladder Diagram, Wall – 1  
 Four Color Combination Screen Chart – 1  
 Sample Signature – 1  
 Yearbook Sales Manager Kit – 1  
 Receipt Books – 1 sample  
 BalfourTools/StudioWorks Kit/Documentation/  
 Design Reference (as applicable) - 1

**FREE &  
INCLUSIVE**

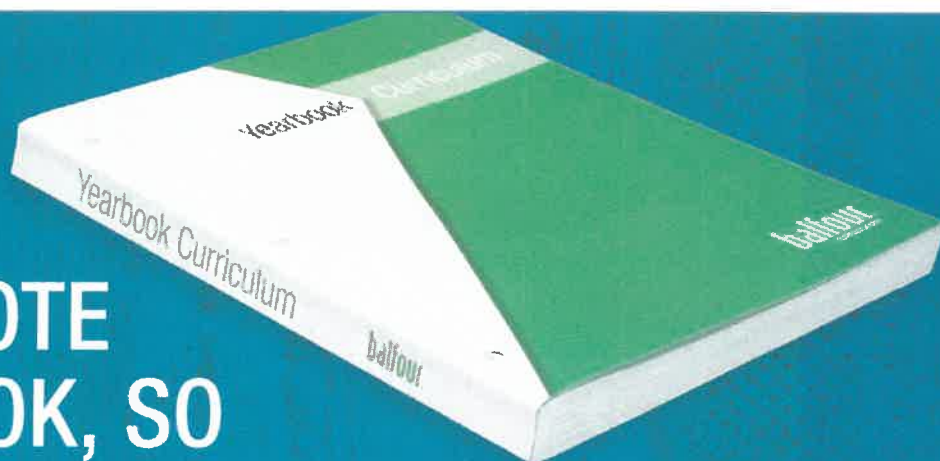






# FREE CORE-ALIGNED CURRICULUM

## WE WROTE THE BOOK, SO YOU DON'T HAVE TO

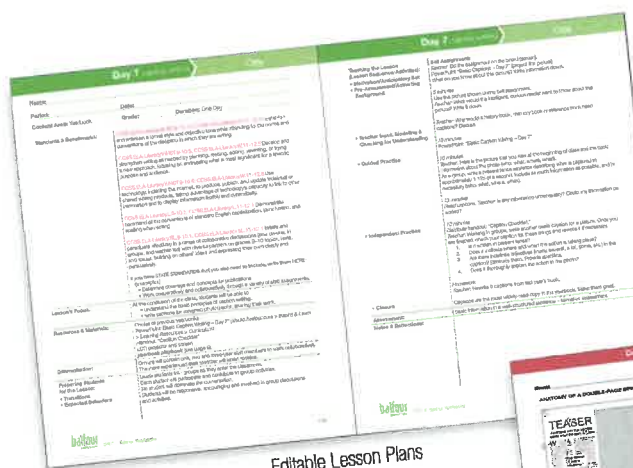


### Introducing the Balfour Yearbook Curriculum. Comprehensive. Customizable. Common Core-Aligned.

Balfour is proud to introduce the only fully-integrated curriculum written specifically for yearbook advisers. Based on today's classroom standards, this incredible resource is groundbreaking in magnitude and scope. The 11-week curriculum includes everything advisers need to teach and assess their yearbook students.

Aligning with Common-Core Standards and fully embracing Partnership for 21st Century Skills, each lesson includes:

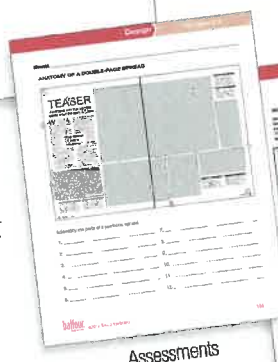
- Standards and benchmarks
- Lesson focus
- Resources and materials
- Classroom management
- Differentiation for accommodations
- Bell assignments
- Scripted guided and independent practice
- Closure



Editable Lesson Plans

Thorough and targeted materials supplement classroom instruction, including:

- Assessments
- Handouts
- Lesson Slideshows



Assessments



Handouts



Worksheets

**FREE &  
INCLUSIVE**



# COMPLIMENTARY CORE-ALIGNED CURRICULUM

In addition to the Curriculum book each unit has digital files available for download at [www.studio.balfour.com](http://www.studio.balfour.com). Here you will find digital versions of:

- Student resources for each unit
- Coordinating power points
- Handouts
- Rubrics
- Worksheets
- Teaching slide show power points
- Editable .docx version of the daily lesson plans if you need to revise

Academics.pdf  
Beat Sheet.pdf  
Clubs.pdf  
Content Planning.pdf  
Faculty Data.pdf  
Graphic Organizer.pdf  
Ladder Diagram.pdf  
Ladder.pdf  
People.pdf  
Post-Season Survey.pdf  
Pre-Season Survey.pdf  
Sports Report.pdf  
Sports.pdf  
Student Life.pdf  
Coverage\_Day1\_YouSpread.ppt  
Coverage\_Day3.ppt  
Lesson Plans\_Coverage.doc

**Organization Resources**  
essential resources for staff recruiting, staffing and evaluation.

**StudioWorks**  
hands-on lessons for learning the essentials of Balfour's online yearbook publishing software.

**Theme**  
emphasis on a collaborative, problem-solving process to create a theme.

**Design**  
details a step-by-step process from basic to advanced design.

**Coverage**  
leads staff through a process to arrive at fresh subjects and different angles.

**Copy**  
establishes writing procedures for copy, captions, headlines and theme.

**Photography**  
includes photo basics: camera, composition, planning, storing and cropping.

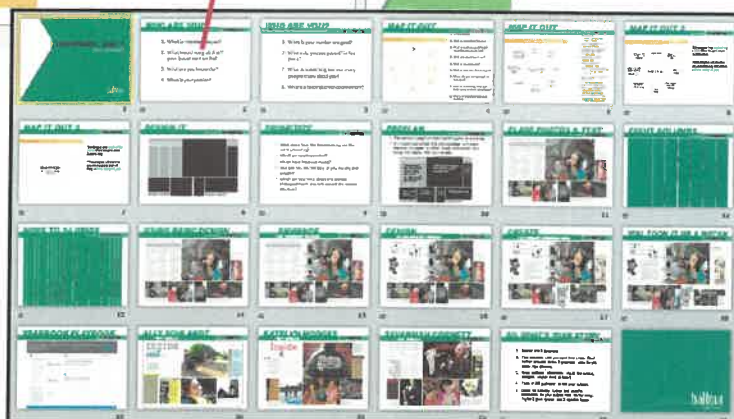
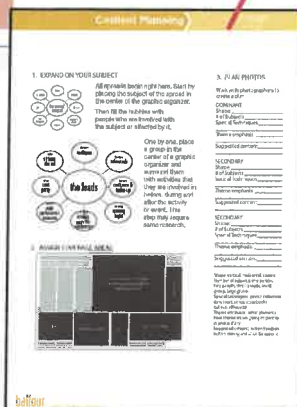
**Ad Sales & Design**  
covers all aspects of planning, selling and designing ads.

**Book Sales**  
explains the whys and hows of marketing and selling the book.

**Legal**  
defines students' rights and responsibilities including libel and copyright.

**Leadership**  
spells out a way to cultivate leaders on the staff.

**Evaluation**  
provides tools to evaluate students' work.





## 3 SOFTWARE OPTIONS TO CHOOSE FROM

Balfour provides 4 different production software solutions to building your book. If you are online or working from your server, we have options to meet your needs. Chromebooks? No problem! We offer MyYear and Encore, both in HTML5, to seamlessly build a great book. OR if InDesign is your desire, with BalfourGo you can build a book remotely and with Chromebooks!

The logo for BalfourTools, featuring the word "balfour" in a bold, lowercase, sans-serif font, followed by "tools" in a smaller, italicized, lowercase, sans-serif font. The text is white and set against a solid blue rectangular background.

### [BalfourTools® for Adobe® InDesign®](#)

A powerful yearbook extension/plugin for Adobe InDesign, BalfourTools lets you easily track and manage your publication's documents, images and status from a single folder. BalfourTools automates the time-consuming steps in producing a yearbook and allows all yearbook files to be shared across a network, making it easy to save and find files.

The logo for StudioWorks, featuring the word "studio" in a bold, lowercase, sans-serif font, followed by "works" in a smaller, italicized, lowercase, sans-serif font. The text is white and set against a solid orange rectangular background.

### [StudioWorks+®](#)

StudioWorks+ is an innovative online solution for planning, organizing, designing and proofing a great-looking yearbook in a fraction of the time. Easy to learn & use, StudioWorks has professional design tools that allow you to produce a show-stopping book from wherever you need to work. Safe & secure storage of your data, tools for managing multiple user accounts and the ability to set individual permissions allow you to retain complete control.

The logo for Encore, featuring the word "encore" in a bold, lowercase, sans-serif font, followed by a stylized graphic of three overlapping, curved lines in blue, yellow, and red. The text is black.

### [Encore®](#)

It's the yearbook experience, re-imagined. This all-new online yearbook design software allows you to plan, organize and create a great-looking yearbook, with ease. It's unlike anything you've seen before—intuitive, flexible and accessible from virtually any device. No installation or IT setup is required—simply open up your web browser and get right to work, from anywhere!



# YOUR COMPLETE SOLUTION TO YEARBOOK DESIGN ON THE GO

Create anywhere, from any device.

**BalfourGO** makes the industry's best yearbook platform even better. With our cutting-edge virtual lab, create your yearbook free from the bounds of the yearbook classroom. This innovative technology is ideal for Chromebook schools.

**From the classroom to the coffee shop, accessing BalfourGO is a snap!**



#### Use with Chromebooks

BalfourGO works seamlessly with Chromebooks.



**Seize the Moment** Creativity strikes when you least expect it. Access your project anywhere so you don't lose those "eureka" moments.



#### Choose your fonts

Choose from thousands of font selections. Unleash your creativity without restrictions.



#### Keep it secure

Prevent security breaches with apps that run in the cloud. Your data never leaves BalfourGO's secure datacenter.

**Design and manage on your time with streamlined technology.**



#### Everything Adobe at your Fingertips

Tap into any of Adobe's Creative Cloud apps including InDesign®, Photoshop® and Illustrator® to bring your ideas to life.



**Everyone's Happy** Students can get to work in the classroom without administrative rights, while meshing seamlessly with your district's IT environment. You can strike "downtime" and "network issues" from your vocabulary.



#### Everything in its Place

BalfourGO keeps your yearbook project files organized and safe in the cloud.

Powered by **balfour**.go

Visit [BalfourGOTest.com](http://BalfourGOTest.com) to test your network speed compatibility.

BalfourTools and BalfourGO were created by Balfour, an industry leader with over 80 years of experience helping schools and universities preserve their memories and achievements.



# TECHNOLOGY - INDESIGN

## The only complete yearbook management system.

BalfourTools, the #1 solution for creating yearbooks with Adobe® InDesign®, includes even more of what you need to create a great publication. Now compatible with Adobe Creative Cloud®, BalfourTools solves your biggest yearbook challenges better than ever before. See increased productivity, powerful flowing, advanced spread and content management all inside of Adobe InDesign Creative Cloud versions as well as CS5.5 and CS6.0. BalfourTools works seamlessly across networks for both MacOS and Windows.



Powered by **balfour**

Balfour is an industry leader with over 100 years of experience helping schools and universities preserve their memories and achievements.

## Everything in its place.

Keeping track of all your photos is one of the most challenging aspects of yearbook production. BalfourTools, a tremendously powerful tool, provides a means for efficiently dealing with photos. Whether you're choosing which pictures to use, moving photos, tagging people for the index, or automatically generating photo bylines, BalfourTools manages it all for you.



## Keep everyone on the same page.

Individual staff logins, the ability to see who has which spreads open, and intra-staff messaging are part the communication tools built in to BalfourTools. They'll help you stay in contact with the important people who create your yearbook, and stay on track.

## Less work, more fun.

BalfourTools makes complicated tasks such as flowing portrait pages or re-organizing spreads painless. Apply a template to a range of spreads in seconds without ever opening a single page. When it comes time to proof and submit, batch processing of PDFs cuts your work time in half. BalfourTools empowers you to do all of this, faster and more efficiently.



# TECHNOLOGY - STUDIOWORKS

## "They really did think of everything."

StudioWorks is an online yearbook design program that allows anyone to plan, organize and create a great-looking yearbook. It works hard so you don't have to.

Whether you're a seasoned yearbook pro or a rookie, StudioWorks' professional design features allow you to create stunning layouts quickly and easily. Hundreds of built-in fonts, templates and design graphics are at your fingertips, and Balfour's customer support team is ready to help you navigate the process.

With safe and secure storage of your data and the ability to set individual permissions, StudioWorks frees you to be your productive and creative best. Don't be surprised when your school votes you "Most Likely to Create the Best Yearbook, Ever."

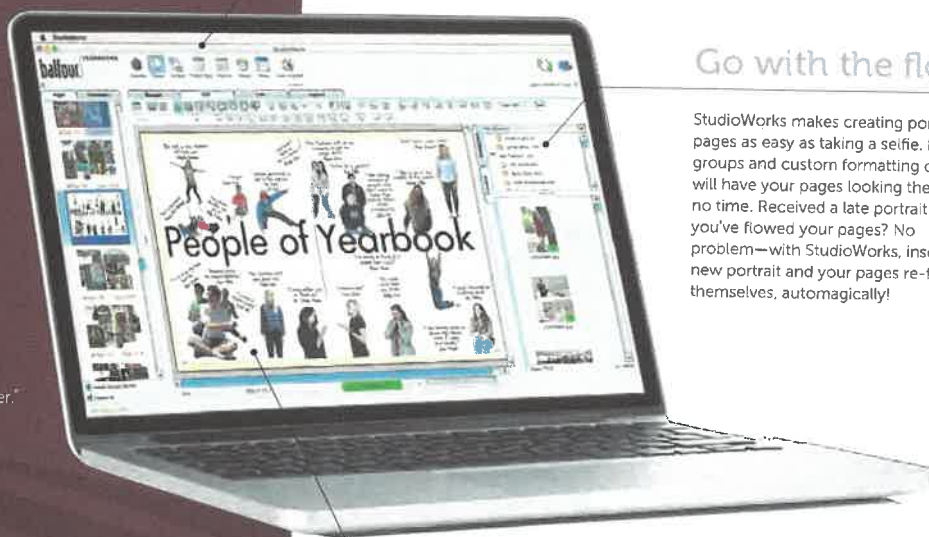


Powered by **balfour**

StudioWorks was created by Balfour, an industry leader with over 100 years of experience helping schools and universities preserve their memories and achievements.

## Less work = more fun.

With so many creative options, StudioWorks makes it easy to create a great-looking yearbook. Just a click away are hundreds of the trendiest fonts, thematic design templates, professional image and text effects, and Balfour's simplyCreate® theme packages. Productivity features like dragging and dropping images to layouts from your desktop, pasting text directly from Word or Google Docs, and Pack & Go layouts maximize your time by helping you spend less of it on tedious tasks.



## Go with the flow.

StudioWorks makes creating portrait pages as easy as taking a selfie. Flexible groups and custom formatting of names will have your pages looking their best in no time. Received a late portrait after you've flowed your pages? No problem—with StudioWorks, insert the new portrait and your pages re-flow themselves, automatically!

## Show your ads who's boss.

If the thought of creating ads make you cringe, you'll love adBuilder®. This free tool allows parents and businesses to purchase and create yearbook advertisements online, freeing you from hours of work (and collecting payments). Choose your ad sizes, and your advertisers can create their ads easily using pre-designed templates. Completed ads are delivered online to your yearbook staff!



# TECHNOLOGY - ENCORE

**"Beautifully designed,  
infinitely usable."**

Encore is all-new online yearbook design software that allows you to plan, organize and create a great-looking yearbook. It's unlike anything you've seen before—intuitive, flexible and accessible from virtually any device.

Whether you're a yearbook pro or rookie, Encore's wizard-based guidance allows you to quickly and easily create stunning layouts. Dynamic page features make organizing your pages and sections a breeze.

With Encore, you have more than 600 trendy fonts, engaging themes and stylish graphics at your fingertips, along with a skilled support team to help you navigate the process.

Safe, secure storage of your data and the ability to set individual permissions free you to be your productive and creative best. With Encore, you and your yearbook will be the stars of the school year.



Powered by **balfour.**

Encore was created by Balfour, an industry leader with over 100 years of experience helping schools and universities preserve their memories and achievements.

**Free yourself.**

Encore's cloud-based technology allows you the flexibility to work from anywhere, on virtually any device. Because Encore works completely in your browser, no special software or plug-ins are required. So whether you work from home or your favorite coffee shop, Encore is ready when you are.

**Zero to sixty.**

Spend less of your time getting ready, and more time being creative. Encore's Setup Wizard breezes through your book's setup, reducing time spent organizing pages and sections. From visual page organization to dynamically re-arranging pages (and their images), Encore frees you to be your creative best.



**encore**

**Go with the flow.**

Encore makes creating portrait pages as easy as 1-2-3. The exclusive Portrait Wizard streamlines and simplifies the most complex section of the yearbook. Flexible groupings and custom formatting will have your portrait pages looking their best in no time.

For more information, visit [www.balfour.com/encore](http://www.balfour.com/encore)



## IMAGESHARE



# Image Share

the **EASY** way to  
get more photos for the  
yearbook

Yearbook photographers can't be everywhere. With Balfour's Image Share app, anyone in your school community can easily share photos of school events or friends from their mobile devices.

### It's SO easy!

Students or parents simply download the iOS or Android app, create an account and enter your yearbook's information, and you're ready to go. Photos can be selected from an existing gallery or taken using the app itself. Each submitted photo includes contributor information, photo identifications and a caption.



### You're in control

You have complete control over when images can be contributed. Password protection provides additional security for your school community. Once uploaded, you can review all submissions before sharing them with the yearbook staff. Approved images can be organized into galleries for later use.

### How will you use Image Share?

Extend yearbook coverage with additional photos from school performances, classroom activities, sporting events, homecoming/dances/graduation as well as weekend activities & hobbies. The possibilities are endless!



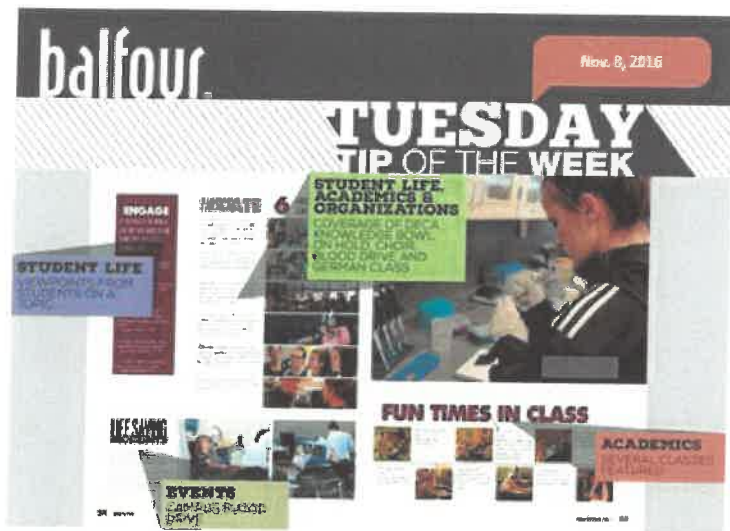
Search for "Balfour Image Share" at the **App Store on iTunes** or on **Google Play**.

**FREE &  
INCLUSIVE**



# TUESDAY-TIP NEWSLETTERS

Every TUESDAY Balfour sends out a digital newsletter with relevant, timely tips. Included in each tip are printed materials, [hyperlinks](#) to downloads and powerpoints. Here is an example of 3 Tuesday-Tips!



## TODAY'S TIP: Blended coverage

Blended coverage provides an alternative way to cover academics, clubs and sports in a more balanced and realistic way. It's also allows coverage of multiple groups in less space.

The most common ways to blend coverage are by chronology or similarity. A chronology spread shows what happens on a given day, week or month. A December semester end projects, Christmas parties and holiday events spread shows similarities provides a topical approach. A sports spread shows trainers, football managers, the band, etc.

Employing a blended coverage approach allows you to include actual activities classes and clubs do, and gives active groups to receive additional coverage.

Consider these blended coverage ideas:

- A November spread could feature the school's Thanksgiving and Black Friday shopping.
- A projects and presentations spread all semester and creates better picture opportunities.
- A fundraiser, T-shirt or holiday party spread all semester.
- A volunteering and leadership spread would show student government or participate in volunteer activities.
- Freshman and junior varsity teams could share their traditional story for mini-stories, Q&As or quote interviews with five teams.

Not sure how to get started? Learn the [step-by-step process](#) for blended coverage spreads.



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Balfour Yearbooks 1550 West Mockingbird Ln., Dallas, TX 75235



## TODAY'S TIP: Go for the goal: team photos & scores

Picture book. Memory book. Record book. Historical book. While we often focus on the photo and memory functions of a yearbook, it's important to remember it is the only permanent record of the school year. The team photos and scores in the book.

In the best-case scenario, the portrait photographer or a local photographer takes the team photos. The photographer directly, asking for photos already taken and the dates for upcoming games. Also ensure spring sports take their photos in time for the final yearbook deadline. Photographers help with team photos, make sure to contact them quickly to obtain the final deadline.

Attends every team photo session, you'll gather names after the pictures are taken. Identify athletes during the season. (It's really hard for football coaches who transferred after the third week when you ask for his name in March of the season to make name identification easier. Another option is to ask the coaches to ID athletes. Often, student managers assist with team photos like football. Make sure to check for name changes and spelling errors.

Down scores if you didn't keep up with it during the season. Or worse, a coach doesn't want to share losing scores. To avoid this, assign a student to print out the schedule and add the score by the game, use the [scorebook](#) or keep a Google doc with the scores. If your school uses a record book, check it regularly to update your team's record after take a picture of the scorebook at the end of the season.

Included scores before, consider taking it slow. Maybe include it in the next. If space is an issue, run only the district or conference year to eventually include scores for all teams.

Getting information easier. Go for the goal!



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## The TIES that bind

With a new school year comes new Tips of the Week! We're excited to share advice, useful ideas and best practices every Tuesday courtesy of your local Balfour representative.

### TODAY'S TIP: The ties that bind: Get to know your staff

Say goodbye to summer and hello to yearbook! As we head back to the classroom, this is an opportune time to get to know each other and start bonding as a staff. Connect with these fun, simple activities:

- Create goody bags for the first day or week. Have editors personalize the bags with staffers' names and stuff them with cheap school supplies and candy.
- Embrace your goofy sides. Ask staffers to share an obsession, idiosyncrasy or surprising fact. Take turns with the reveals or write them down and have the staff guess who they belong to.
- Make speedy connections. Using the speed dating format, pair up veteran staffers with new ones. Have the veteran ask the newbie a fun yearbook or personal question. Every 30 seconds have the newbies switch seats, until they've talked with each veteran. The next time, let the newbies ask the questions and have the oldies switch seats.

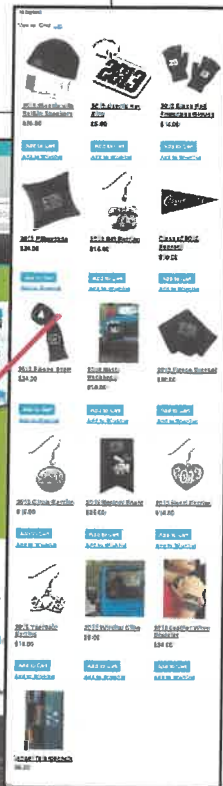
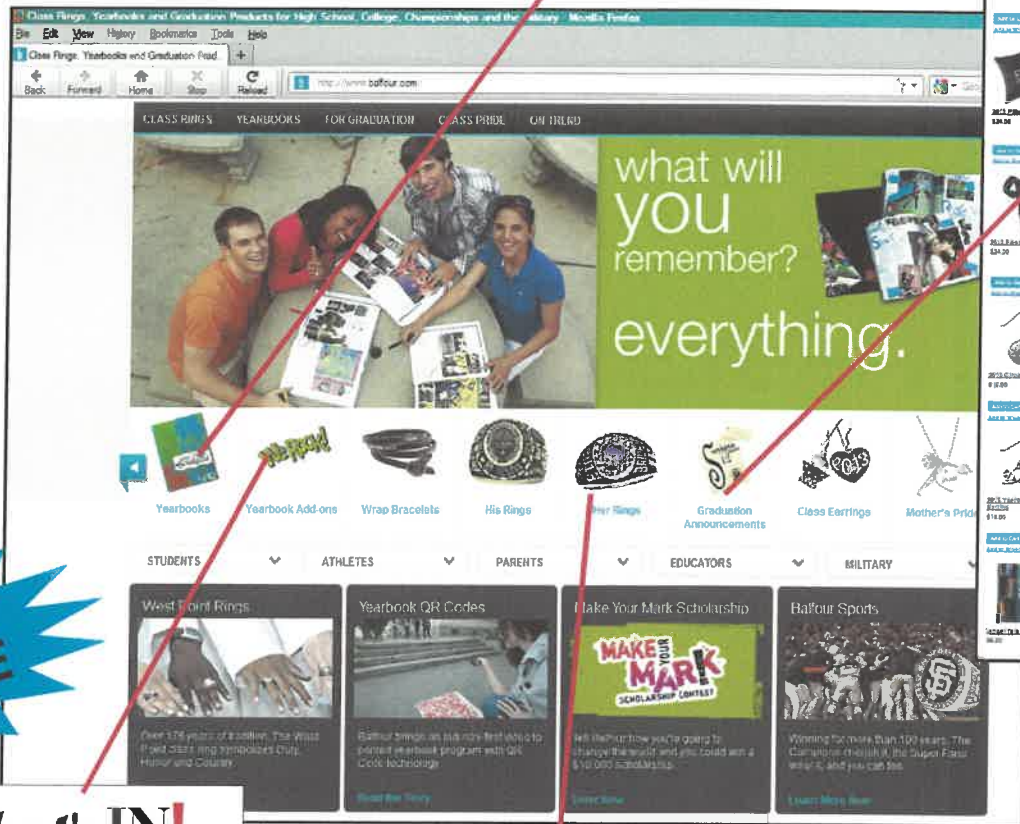
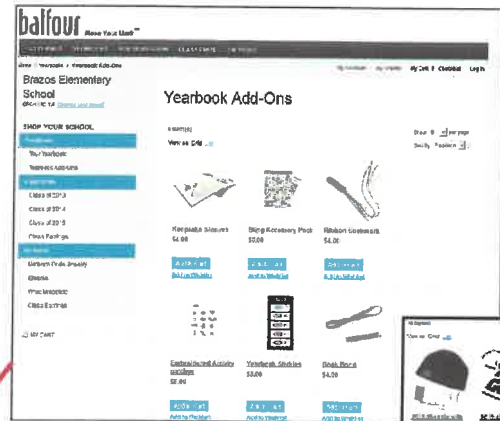
Still looking for fun ideas? Here's a [list of 40 ice breakers by Graham Knapp](#) that will encourage working together, integrate new members into the staff and create a happy, fun atmosphere. Have a blast bonding with your new staff!

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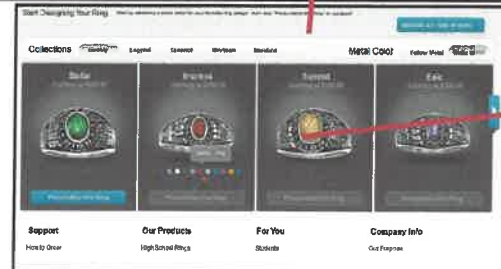


# COMPLIMENTARY ONLINE SALES OPTION

- Customized yearbook sales
- Also offer rings, graduation products & more
- Allows school to set their own price on items
- School can include custom items
- No log-in info, just school name to access
- Easy to set up!



**FREE &  
INCLUSIVE**



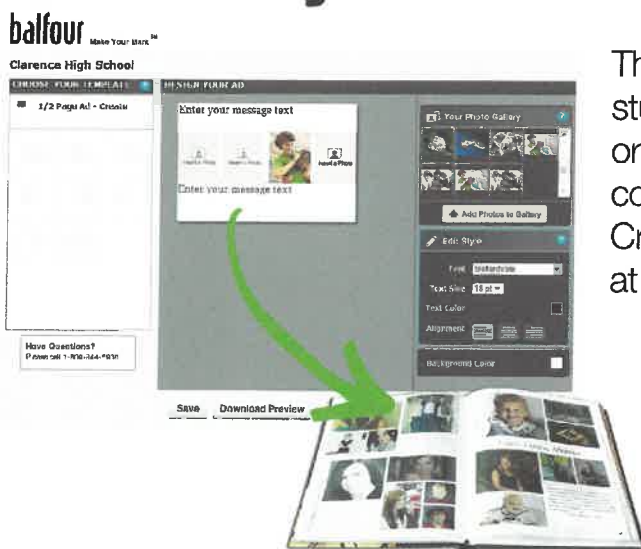


## AD BUILDER ONLINE PRODUCTION



Celebrate everything: fun, friendships, activities and achievements.

## create a school name yearbook ad today!



There is no better way to applaud your student's achievements than a tribute in his or her yearbook. Celebrate with words of congratulation, praise & encouragement. Create, finalize and pay for your ad online at [balfour.com](http://balfour.com)

### Ad Pricing:

size 1	\$00	size 4	\$00
size 2	\$00	size 5	\$00
size 3	\$00	size 6	\$00

Ad Deadline: **month, date, year**

### It's easy to create & purchase online:

1. Visit **balfour.com** & type in your school name
2. Click at top right to create an account (*name, email & password*)
3. Once you are logged in, click on your school name at top left
4. Select the **Yearbook icon** & on the next screen select **Yearbook Ads** from the list on the left
5. Choose your desired ad size
6. Enter student's first & last name, click **Create New Ad**
7. Choose template
8. Upload photos, add text & design ad
9. Click **Add to Cart** & check out – **Ad will be automatically delivered to yearbook staff**

*Our school reserves the right to edit ads based on school policy and yearbook guidelines.*



## INCLUSIVE WORKSHOP TRAINING

- May 15 Balfour - Spring Training, Renton Community Center FREE
- July 12-15 Balfour - Adviser Workshop, Dallas, SCHOLARSHIP INCLUDED
- Sept 13-15 Balfour "Summer" Yearbook Workshop, SCHOLARSHIPS INCLUDED
- Oct 27-31 Balfour Cover sessions AT schools, FREE
- Oct & Nov Local CUSTOM Design Workshops FREE
- Dec 13 Advanced Design Workshop, Bellevue WA SCHOLARSHIPS INCLUDED

## WORKSHOP SCHOLARSHIPS

After a polling of area high school and middle schools we have decided to move our "Summer" workshop to just after school starts. The workshop will be Sept 13-15, 2019. The hope is that more students will be able to attend because teachers will have a current class list and vacations and sports will be a limited factor. We also hope that the momentum created at the fall workshop will continue and provide an explosive start to the year.

### ADVISER SCHOLARSHIPS

We will provide single-room scholarship for each adviser to attend the workshop in Seattle, Sept 13-15. Room, board, registration and training are all provided.

### STUDENT SCHOLARSHIPS

We will provide 4 shared-room student scholarships for each high school to attend the September workshop. Room, board, registration and training are all provided.









