



Request for Proposal

RFP#012 MARKETING AND ADVERTISING SERVICES

JENNA JOHNSON



This Request for Proposal (RFP) is a competitive procurement issued by Washington’s Lottery (Lottery) pursuant to chapter 39.26 of the Revised Code of Washington (RCW). Lottery intends to establish and award a contract for Marketing and Advertising Services with a contract term of four (4) years with four (4) one (1) year extensions available at the discretion of the Lottery.

Table of Contents

AGENCY OVERVIEW	3
A. THE BIDDING PROCESS	4
Section 1 - Deadlines and Questions	4
Section 2 - How to Prepare and Submit a Proposal for this RFP.....	5
2.1. Bidder Communications and Questions.....	5
2.2. Pre-Bid Conference	5
2.3. Pricing Proposal	5
2.4. Proposal Submittal Checklist - Required Proposal Submittals.	6
2.5. Proposal Format.	6
2.6. Submitting Proposals.....	6
Section 3 - Proposal Evaluation	7
3.1. Overview.....	7
3.2. Responsiveness (Step 1).	8
3.3. Evaluation (Step 2).	8
3.4. Responsibility Analysis (Step 3).	9
3.5. Presentations (Step 4).	9
3.6. Best and Final Offer (Step 5).	9
Section 4 - Contract Award	10
4.1. Announcement of Apparent Successful Bidder (ASB).....	10
4.2. Contract Negotiations	10
4.3. Contract Execution.....	10
B. SCOPE OF WORK	11
Accounting	12
Competitive Bidding	13
Cost Savings.....	13
Estimates Required	13
Invoices	14
Advance Payments	14
Advertising	14
<i>Advertising Development</i>	14



<i>Media Plan and Strategic Plan Development</i>	16
<i>Advertising Sensitivity</i>	16
<i>Washington's Lottery Advertising Guidelines</i>	17
Collateral Material and Signage	17
Conventions/Trade Shows/Special Events/Meetings	17
Co-Promotions	18
Media Planning and Buying	18
<i>Bonus Commercials</i>	18
<i>Negotiation and Placement</i>	18
<i>Placement Verification</i>	18
<i>Post-Buy Analysis</i>	19
<i>Spending Analysis</i>	19
<i>Media Services</i>	19
Web Management	20
Mall Touch Screen	24
Menu Boards	24
Other Services	25
Promotional Items	25
Public Relations	25
Public Service Announcements	26
Research	27
Retailer and Regional Visits	27
Retail Marketing Support	27
Strategic Planning	28
Staffing	28
Washington's Lottery Orientation	30
C. ADMINISTRATIVE PROPOSAL	31
Bidder Experience and Expertise	31
Contract Team and Key Personnel	32
Business Approach and Processes	33
D. ADDITIONAL QUESTIONS	34
E. CASE STUDY	35
F. EXHIBITS	36



AGENCY OVERVIEW

Washington's Lottery sales broke the \$800 million mark in fiscal year 2019 for the first time in its history, [Exhibit A - Additional Information](#), and we are committed to becoming a billion dollar lottery within the next few years.

Washington's Lottery is a state agency that was created in 1982. Our directive is to generate sales in an effort to continually increase our contributions to our beneficiaries, [Exhibit A - Additional information](#). We are governed by State laws and regulations, which create boundaries within which we must adhere to when marketing and advertising our products. We like to say, "Let's be funny but **Government** funny."

Our current game portfolio consists of seven draw games; Powerball, Mega Millions, Lotto, Hit 5, Match 4, Daily Game and Daily Keno. In addition to the draw portfolio, we also launch approximately 50 scratch ticket games a year. Our scratch ticket sales represent somewhere between 65%-70% of our annual sales. We sell our products through more than 3600 retailers statewide which places us in very diverse communities. We are one of the largest vending lotteries in the industry with almost 2000 vending machines placed throughout the state, and vending is 47% of our market share.

We are similar to many businesses in that we are trying to reach a younger demographic. After decades of following a standard marketing formula of advertising our games, jackpots, and big winners, the Lottery's player base is aging. Despite new games, promotions, and creative TV campaigns, over 50% of the state is not playing. The challenge is how do we make playing Washington's Lottery fun for all Washingtonians and fulfill our mission to increase our contributions. Through research, it is very clear that our core player base is comprised of older players and we are not attracting a younger audience. We have developed a player profile that we call the "Mill-X," [Exhibit A - Additional Information](#), in order to focus on who we best believe is a future lottery player.

Welcome to the Department of Imagination (DOI)! Are you ready to have your mind blown?

We discovered one of the real benefits the Lottery provides is not just the payout - it is the intrinsic entertainment of imagining and showing people the power of their own imaginations. Even more important, it is what people love about playing the Lottery. People have imaginations... we just need to foster them.

This discovery completely changed our relationship with potential players and shifted our advertising and communications approach.

By moving away from marketing individual products and instead focusing on encouraging our players' imaginations, we have built a solid consumer-focused foundation for communication, which turned into the DOI brand. While we continue to encourage people to play lottery games, we design campaigns to actively engage our players' imaginations and inspire them to talk about the lottery with us, about us, and with their friends. It's great to be in the conversation!

The best agency will be the one with the greatest expertise that is relevant to our business -- building brand, increasing product recognition, and opening Lottery up to new demographics of players.

A. THE BIDDING PROCESS

The Bidding Process is divided into 4 Sections:

- [Section 1](#) - Deadlines and Questions.
- [Section 2](#) - How to Prepare and Submit a Proposal for this RFP.
- [Section 3](#) - Proposal Evaluation.
- [Section 4](#) - Contract Award.

Section 1 - Deadlines and Questions

This section identifies important deadlines for this RFP and where to direct questions regarding the RFP.

The following table identifies important dates for this RFP:

RFP Posting Date:	December 2, 2019
Pre-Bid Conference: December 12, 2019 Washington's Lottery Headquarters 2:00 p.m. Pacific Time	Attend in Person: 814 4 th Ave E Olympia WA 98506 Attend via Phone: Phone Number: 360.810.2899 Conf. ID: 6184 Pass Code: 6184
Question & Answer Period:	December 3, 2019 - December 31, 2019
Deadline for Submitting Proposals:	January 9, 2019; 4:00PM Pacific Time
Presentations	February 24, 2020 - March 15, 2020
Anticipated Announcement of Apparent Successful Bidder:	March 16, 2020
Negotiate Contract	March 27, 2020 - April 10, 2020
Anticipated Contract Execution:	May 1, 2019
Transition Period	May 2, 2020 - June 30, 2020

The RFP (and award of the contract) is subject to complaints, debriefs, and protests as explained in [Exhibit F - Complaint, Debrief & Protest Requirements](#), which may impact the dates set forth above.

Lottery reserves the right to amend and modify this RFP. Only bidders who have properly registered and downloaded the original RFP directly via WEBS will receive notifications of amendments to this RFP, which bidders must download, and other correspondence pertinent to this procurement. To be awarded a contract, bidders must be registered in WEBS. Visit <https://fortress.wa.gov/ga/webs> to register.

Questions or concerns regarding this RFP must be directed to the following Procurement Coordinator:

Jenna Johnson

Jenna.Johnson@walottery.com

360.480.1611

Section 2 - How to Prepare and Submit a Proposal for this RFP

This section identifies how to prepare and submit a proposal to Lottery for this RFP. By responding to this RFP and submitting a bid, bidder acknowledges having read and understood the entire RFP and accepts all information contained within this RFP.

- 2.1. **Bidder Communications and Questions.** During the RFP process, all bidder communications regarding this RFP must be directed to the Procurement Coordinator. Bidders should rely only on this RFP and written amendments to the RFP issued by the Procurement Coordinator. In no event will oral communications regarding the RFP be binding.
 - Bidders are encouraged to make any inquiry regarding the RFP as early in the process as possible to allow Lottery to consider and, if warranted, respond to the inquiry. If a bidder does not notify Lottery of an issue, exception, addition, or omission, Lottery may consider the matter waived by the bidder for protest purposes.
 - If bidder inquiries result in changes to the RFP, written amendments to the RFP will be issued and posted on WEBS.
 - Unauthorized contact regarding this RFP with other state employees involved with the RFP may result in bidder disqualification.
- 2.2. **Pre-Bid Conference.** Lottery will host a RFP pre-bid conference at the time and location indicated in Section 1 of this RFP. Attendance is not mandatory. However, bidders are encouraged to attend and participate. The purpose of the pre-bid conference is to clarify the RFP as needed and raise any issues or concerns that bidders may have. If interpretations, specifications, or other changes to the RFP are required as a result of the conference, the Procurement Coordinator will post an amendment to this RFP on WEBS. Assistance for disabled, blind, or hearing-impaired persons who wish to attend the pre-bid conference is available with prior arrangement by contacting the Procurement Coordinator.
- 2.3. **Pricing Proposal.** Prices must include all cost components needed for the delivery of the goods and/or services as described in this RFP. See [Exhibit D - Pricing Proposal](#). A bidder's failure to identify all costs in a manner consistent with the instructions in this RFP is sufficient grounds for disqualification.
 - **Inclusive Pricing:** Bidders must identify and include all cost elements in their pricing. In the event that bidder is awarded a contract, the total price for the goods and/or services shall be at bidder's submitted price for the first year (July - June). Prices for the following years will be negotiated during the development of the annual advertising media plan.



2.4. Proposal Submittal Checklist - Required Proposal Submittals. This section identifies the proposal submittals that must be provided to Lottery to constitute a responsive proposal. The checklist provided below includes all of the documentation that must be submitted to be considered a complete proposal. Proposals that do not include the submittals identified below may be rejected as nonresponsive. In addition, a bidder's failure to complete any submittal as instructed may result in the proposal being rejected. Bidders must identify each page of the submittals and any supplemental materials with bidder's name and the following naming convention.

- EXHIBIT B - BIDDER PROFILE**
This document is required information for contract administration purposes and to be considered responsive to this RFP.
- EXHIBIT C1 - CERTIFICATION AND ASSURANCES**
This document is required by chapter 39.26 RCW. Complete certification, attach to the proposal and submit to Lottery.
- EXHIBIT C2 - WAGE THEFT CERTIFICATION**
This document is required by chapter 39.26 RCW. Complete certification, attach to the proposal and submit to Lottery.
- EXHIBIT C3 - CERTIFICATION FOR EO 18-03**
This document is required information for contract administration purposes.
- EXHIBIT D - PRICING PROPOSAL**
Bidder must complete the price worksheet template as instructed in *Exhibit D - Proposal Price*.
- EXHIBIT E2 - CONTRACT ISSUES LIST**
If bidders have any business concerns related to *Exhibit E1 - Contract*, bidders must complete *Exhibit E2 - Contract Issues List* template and include with the proposal to Lottery.
- ADMINISTRATIVE PROPOSAL SUBMISSION**
- RESPONSE TO ADDITIONAL QUESTIONS**
- CASE STUDY SUBMISSION**

2.5. Proposal Format. Proposals must be complete, legible, and, as applicable, signed. Unless otherwise specified in writing by Lottery, documents included must be prepared in MS Word, MS Excel, or Adobe PDF and on plain white paper. The proposal must be signed (original, electronic, or scanned) by a person authorized to contract for the bidder.

2.6. Submitting Proposals. Your proposal must be delivered as follows:

Bidders are required to submit six (6) copies of their proposal and one digital copy. One paper copy must have original signatures and the others can have photocopied signatures. **The proposal, whether mailed or hand delivered, must arrive at the Lottery's headquarters no later than 4:00 p.m., Pacific Standard Time, on January 9, 2020.**

The proposal must be sent to and addressed as follows:

Washington's Lottery
Attn: RFP #012, Jenna Johnson
814 4th Ave E
Olympia WA 98506

Or

Washington's Lottery
Attn: RFP #012, Jenna Johnson
PO Box 43040
Olympia WA 98504

Bidders assume the risk for the method of delivery chosen. The Lottery assumes no responsibility for delays caused by any delivery service. Late proposals will not be accepted and will be automatically disqualified from further consideration.

Section 3 - Proposal Evaluation

This section identifies how Lottery will evaluate RFP proposals.

3.1. Overview. Lottery will evaluate proposals for this RFP as described below.

- Lottery reserves the right to determine a bidder's compliance with the requirements specified in this RFP, request clarification, and to waive informalities in a proposal. An informality is an immaterial variation from the exact requirements of the competitive RFP, having no effect or merely a minor or negligible effect on quality, quantity, or delivery of the supplies or performance of the services being procured, and the correction or waiver of which would not affect the relative standing of, or be otherwise prejudicial, to bidders.
- Lottery reserves the right to: (1) Waive any informality; (2) Reject any or all proposal, or portions thereof; (3) Accept any portion of the items proposed unless the bidder stipulates all or nothing in their proposal; (4) Cancel an RFP and re-solicit proposals; and/or (5) Negotiate with the highest scored responsive and responsible bidder to determine if that proposal can be improved.
- Lottery will use the following process and evaluation criteria for an award of a contract
 - [Step 1](#): Responsiveness
 - [Step 2](#): Evaluation
 - [Step 3](#): Responsibility Analysis
 - [Step 4](#): Presentations
 - [Step 5](#): Best and Final Offer



- 3.2. **Responsiveness (Step 1).** Lottery will review proposals on a pass/fail basis to determine whether the proposal is ‘responsive’ to this RFP. This means that Lottery will review each proposal to determine whether the proposal is complete. Lottery reserves the right, in its sole discretion, to determine whether a proposal is responsive. Bidders whose proposals are determined to be non-responsive will be rejected and will be notified of the reasons for this rejection.
- 3.3. **Evaluation (Step 2).** Lottery’s assigned Evaluation Team will evaluate and score each responsive proposal based on the evaluation criteria provided below.

Evaluation Criteria	Assigned Points
Mandatory Requirements	Pass/Fail
Administrative Proposal	400
Additional Questions	300
Case Studies	900
Pricing	400
Subtotal	2000
Not more than five (5) highest scored bidders will be invited to conduct oral presentations.	
Presentation	1000
Total	3000 Points
Washington State Procurement Priorities & Preferences	
Executive Order 18-03 Certification	1% (30 pts)
Veteran Owned	3% (90 pts)
Minority and Women Owned Business Enterprise	3% (90 pts)

WASHINGTON STATE PROCUREMENT PRIORITIES & PREFERENCES. Lottery will apply the following Washington State procurement priorities and preferences to this Competitive Solicitation:

- Procurement Evaluation for Executive Order 18-03 (firms without mandatory individual arbitration for employees). Pursuant to RCW 39.26.160(3) (best value criteria) and consistent with [Executive Order 18-03 - Supporting Workers’ Rights to Effectively Address Workplace Violations](#) (dated June 12, 2018), Lottery will evaluate bids for best value and provide a bid preference in the amount of 1% to any bidder who certifies, pursuant to the certification attached as [Exhibit C1 - Contractor Certification for Executive Order 18-03 - Workers’ Rights](#), that their firm does **NOT** require its employees, as a condition of employment, to sign or agree to mandatory individual arbitration clauses or class or collective action waiver.
- Procurement Preference for Veteran-owned Businesses. In furtherance of Washington’s business inclusion goals, Lottery will evaluate bids for best value and provide a bid preference in the amount of 3% to any bidder who is certified by the [Washington Department of Veteran’s Affairs](#) as a Veteran-owned business.



- Procurement Preference for minority and/or women-owned business. In furtherance of Washington's business inclusion goals, Lottery will evaluate bids for best value and provide a bid preference in the amount of 3% to any bidder who is certified through [Washington State Office of Minority and Women's Business Enterprises](#).

3.4. Responsibility Analysis (Step 3). Lottery will make reasonable inquiry to determine the bidder's responsibility. Lottery will determine bidder responsibility on a pass/fail basis. In determining whether the bidder is a responsible bidder, Lottery will consider the following elements:

- The ability, capacity, and skill of the bidder to perform the contract or provide the service required;
- The character, integrity, reputation, judgment, experience, and efficiency of the bidder;
- The quality of performance of previous contracts or services;
- The previous and existing compliance by the bidder with laws relating to the contract or services; and
- Such other information as may be secured having a bearing on the decision to award the contract.

Lottery may request financial statements, credit ratings, record of past performance, clarification of a bidder's offer, on-site inspection of a bidder's or subcontractor's facilities, or other information as necessary.

Lottery may use references to confirm satisfactory customer service, performance, satisfaction with service/product, knowledge of products/service/industry, and timeliness. Lottery reserves the right to be its own reference. Any negative or unsatisfactory reference can be reason for rejecting a bidder as non-responsible.

3.5. Presentations (Step 4). Bidders selected by Lottery to provide an oral presentation will be provided an agenda detailing what they are expected to present. The agenda will be sent with notification that the bidder has been identified as moving to the presentation step. Presentations will be held at bidder's location.

Each bidder will be allowed two hours for their presentation, followed by up to one hour of Q&A. Bidder will provide a tour of their organization after the Q&A portion is complete.

3.6. Best and Final Offer (Step 5). Lottery reserves the right to use a Best and Final Offer (BAFO) before awarding any contract to further assist in determining the Apparent Successful Bidder (ASB).

Section 4 - Contract Award

This section identifies how Lottery will award the contract.

- 4.1. **Announcement of Apparent Successful Bidder (ASB).** Lottery will determine the ASB. The ASB will be the responsive and responsible bidder whose proposal, in the sole opinion of Lottery, best meets the requirements of this RFP and presents the best total value to Lottery.
 - Designation as an ASB does not imply that Lottery will issue an award for a contract to that firm. Rather, this designation allows Lottery to perform further analysis and ask for additional documentation. A bidder's failure to provide requested information to Lottery within ten (10) business days may result in disqualification. The bidder must not construe this as an award, impending award, attempt to negotiate, etc. If a bidder acts or fails to act as a result of this notification, it does so at its own risk and expense.
 - Upon announcement of the ASB, bidders may request a debriefing conference as specified in [Exhibit F - Complaint, Debrief & Protest Requirements](#).
- 4.2. **Contract Negotiations.** Lottery will negotiate with the ASB to finalize contract terms and to determine if the proposal may be improved. If, after a reasonable period of time, Lottery, in its judgement, cannot reach agreement on acceptable contract terms with the ASB, Lottery may suspend negotiations and undertake negotiations with the next bidder as determined by the evaluations.
- 4.3. **Contract Execution.** Subject to protests, if any, Lottery and the ASB will enter into a contract as set forth in [Exhibit E1 - Contract](#).
 - An award, in part or full, is made and a contract formed by signature of Lottery and awarded bidder on the contract. Lottery reserves the right to award on an all-or-nothing consolidated basis.
 - Following the award of the contract, all bidders will receive a Notice of Award, usually through an email to the bidder's email address provided in the bidder's proposal.

B. SCOPE OF WORK

The Lottery seeks a marketing and advertising partner, to collaborate with and develop plans that increase brand awareness and contributions to our beneficiaries, promote our products, and increase sales. An ideal partner will also help increase engagement, likability, and reach, as well as understand the Lottery's strategic goals and help to achieve these goals.

Plans mentioned within this scope of work include:

Marketing Plan - a comprehensive document/blueprint that outlines the advertising and marketing efforts for the coming year. It incorporates business activities involved in accomplishing specific marketing objectives within a designated time frame.

Advertising Plan - outlines the creative and media tactics, budget, schedule and other elements based upon the agency and marketing strategic plans.

Communication Plan - a comprehensive plan to increase brand awareness, trust and likability, to help our business achieve optimum results in the media.

Media Plan - the process by which marketers determine where, when, and how often they will run an advertisement in order to maximize engagements and ROI. An effective media plan will result in a set of advertising opportunities that target a specific audience and fit in with the Lottery's marketing budget.

Strategic Plan - an organization's process of defining its strategy, or direction, and making decisions on allocating its resources to pursue this strategy. It may also extend to control mechanisms for guiding the implementation of the strategy.

All Marketing, Advertising, Communication and Media plans must incorporate pre-identified metrics that define performance of the successful bidder.

Bidders participating in this RFP will be evaluated on proven and demonstrated creativity, resourcefulness, and capability to help the Lottery meet or exceed future sales goals, beneficiary contributions, and Lottery initiatives. The purpose of this procurement is to identify and select the bidder Lottery believes is the best advertising and marketing solutions partner.

The successful bidder shall provide services including, but not limited to, the following:

- Strategic advertising and promotional planning;
- 3-year strategic advertising/marketing plan;
- Print, broadcast, and promotional creative planning, execution, and production;
- Print and broadcast media planning and buying;
- Public relations expertise and assistance with key communication issues;
- Assisting in the development of the Marketing plan;
- Developing an advertising plan to support Lottery initiatives;
- Budget control and shared responsibility for cost control;



- Researching brand tracking and awareness, and advertising effectiveness;
- Developing presentations regarding marketing initiatives for the Lottery Commission and sales and marketing meetings, and industry conferences;
- Assisting with retailer and community events;
- Development of a digital strategy to support the Marketing and Advertising Plans;
- Developing, managing, and executing a social strategy to promote community engagement across social channels to build engagement, and monitoring and analyzing conversations through all social networks;
- Managing and executing promotional services;
- Providing analysis, advice, and support for key Lottery initiatives to include, but not limited to:
 - Interactive Video Wall
 - Lottery App
 - Winning Awareness
 - Responsible Gambling
 - Asset Collaboration

The successful bidder will be expected to perform all functions normally required of a full-service advertising agency. Agencies that do not offer all of these services are invited to join together with providers that offer a service.

- Media Services
- Public Relations: Product Support
- Public Relations: Corporate Communications
- Promotional Events Services
- Research
- Web Services Management
- Retail Marketing Programs;
- Social Channel Management

In addition to the broad functions listed above, the successful bidder will manage the account within specific guidelines. The following areas of critical concern will be described in detail in this RFP:

- Adequate Staffing Levels and Seniority;
- Advertising Plan Development;
- Public Relations: Comprehensive Communications Support;
- Communications Plan Development;
- Budget Development;
- Timely and Efficient Accounting and Billing; and
- Adherence to Bidding Processes.

Accounting

The successful bidder must provide experienced accounting staff support to implement timely and accurate reports and billing to meet Lottery specifications.

The successful bidder must develop an annual budget for:

- Advertising expenditures,

- Public Relations/Communications (fees and hard costs),
- Web management (fees and hard costs), and
- Other services required by the resulting contract.

The level of anticipated annual spending will be determined by Lottery. Lottery will expect the successful bidder to develop a cost-efficient plan that is responsive to Lottery's marketing, public relations/communication, and web management needs. The successful bidder must recommend ways to generate cost savings wherever possible, and provide quantitative and qualitative measurements that illustrate the Return on Investment for each.

The initial budget will be reviewed monthly and must be revised as required by Lottery. Subsequent budgets must be incorporated in the Advertising Plan and are subject to Lottery approval. The successful bidder shall not make any commitments on behalf of Lottery without Lottery's prior written approval.

Monthly, the successful bidder must provide Lottery with a summary of all approved expenditures to date for the current fiscal year which runs July 1 through June 30. The summary must indicate the current amount billed to Lottery during the fiscal year, the amount billed that has not yet been paid, and amounts committed that have not been billed.

The successful bidder must implement a system to ensure all media is run or published according to any contracts or placement instructions. Affidavits, tear sheets, or other documentation must be provided.

Competitive Bidding

The successful bidder must obtain a minimum of three competitive proposals on any non-media expenditure exceeding \$5,000, if possible. At least one proposal must be from a business certified by the Office of Minority and Women's Business Enterprises (OMWBE) if possible. Documentation of the proposal process, must accompany all appropriate invoices. Any non-media expenditure conducted without three competitive proposals must be documented and be given written approval by Lottery. Only when given approval can successful bidder be excused from obtaining three competitive proposals.

Cost Savings

The successful bidder must make Lottery aware of any cost savings that might be achieved by the expedited payment of media or other invoices.

Estimates Required

The successful bidder must prepare an estimate for any expenditure and obtain the Lottery Contract Manager's written approval before making any commitment on Lottery's behalf. Only the Director, Deputy Director, Sales and Marketing Director, or Contract Manager can give such approval on behalf of Lottery, unless otherwise agreed to in writing. Lottery will not be responsible for any expenditure for which prior written approval was not obtained.

All estimates must be segregated by fiscal year and by budget category, as defined by Lottery (Media, Production, Brand, Public Relations, Web Services, Research, Sports Partnerships, etc.). Estimates must include a project start date and target completion date. Media estimates must include flight dates.

Lottery will not be responsible for expenditures exceeding the estimate. The successful bidder may submit revised estimates for consideration if it appears that the costs of a particular estimate will exceed the originally approved amount.

All costs relating to research, public relations, or other special project work must be completely detailed in any estimate submitted for approval. The approval of any such estimate will be contingent upon the subsequent submission and approval of required documentation. All estimates must be numbered. The successful bidder must maintain a list of all approved estimates, including the amount and description of the expenditure, and provide Lottery with an updated list of all such estimates monthly. The estimate numbers shall appear on the invoice. No payment will be made without a signed estimate.

Invoices

The successful bidder must submit invoices to Lottery on a timely basis upon completion of services approved in a specific estimate. Invoices should include necessary backup documentation to substantiate charges. In general, jobs will be closed 60 days after the date that the approved estimate was signed by Lottery, with the exception of media buys made on a quarterly or annual basis.

Advance Payments

Payment will be made only after the completion of services or delivery of goods authorized in an approved invoice.

Advertising

The successful bidder will:

1. Develop and produce advertising campaigns based on the approved Advertising and Communication Plans, Lottery initiatives, and key products;
2. Develop material or campaigns to support any new promotions, products, or initiatives, including responsible gambling initiatives, that Lottery proposes to bring to the market place; and
3. Develop a Communication Plan for minority and other diversity publications. However Lottery products shall not be unduly advertised to minority, ethnic, or socio-economically disadvantaged populations.

Advertising Development

Alternative Solutions The successful bidder must offer alternative campaigns, rather than only one creative solution to a particular game or promotion. At least three versions of TV storyboards, radio scripts, digital ads, and all other creative products must be offered when the successful bidder makes a creative presentation to Lottery, unless otherwise approved by Lottery Contract Manger

Approval The successful bidder will be expected to obtain written approval from Lottery before producing any advertisement or related material. When producing any creative work, the successful bidder must not vary from approved scripts, storyboards, or print layouts without Lottery's written approval. Failure to adhere to approved scripts, storyboards, or layouts may void Lottery's approval of the estimate for the project. The successful bidder will be liable for all costs if advertisements or collateral materials are executed in a manner not consistent with Lottery's written approval.

Artwork Charges The successful bidder shall charge Lottery one time only for artwork that is used in multiple forms. Artwork required for any print advertisements must be billed as a one-time item on a separate invoice. Any duplication of charges for artwork will be rejected. All original artwork becomes the property of Lottery and will be delivered to Lottery upon request.

Creative Services Following creative bid approval by the Lottery Director, Deputy Director, Sales and Marketing Director, or Contract Manager, the successful bidder will be responsible for the execution, creation, and production of Lottery advertising materials, including but not limited to print, digital, broadcast advertisements, out of home advertising, social, point-of-sale (POS) items, and other materials that may be required by Lottery. The successful bidder must develop multi-media campaigns in support of the brand, games, promotions, and initiatives identified by the Lottery. The successful bidder may also be required to assist the Lottery in developing game names, instant ticket designs, game logos, trade characters, or art for other uses.

Production The successful bidder will submit for Lottery approval all production estimates. Estimates must clearly indicate any subcontractors or other parties who will be involved in the production work and where those parties are located. Any production work to be conducted at a location outside the state of Washington must be specified, and the successful bidder must demonstrate to the Lottery's satisfaction that locations, facilities and/or resources within the State were not adequate for the production work required. The successful bidder should always work towards having production work done in-state. (See [Exhibit A - Additional Information](#) for a Memo from Governor Locke regarding filming in-state.)

Whenever feasible, successful bidder shall give preference to subcontractors that provide living wage jobs, pay health and retirement benefits to employees, and/or are based in Washington State. All subcontractors must comply with state and federal labor laws including minimum wage and overtime requirements, as well as minor work permits.

Routine Meetings There will be routine meetings held between Lottery and the successful bidder. These meetings will include discussion regarding schedules and planning, as well as discussion regarding concept approvals, pre-production of advertisements, and POS or other agency-produced materials. Additional meetings may be held with certain Lottery personnel on an as-needed basis.

Timelines The successful bidder must provide Lottery with a timely response to its advertising and public relations/communications needs within agreed upon timelines. Additional expenditures due to missed timelines by the successful bidder will be the sole responsibility of the successful bidder, unless approved in writing prior by Lottery.

Media Plan and Strategic Plan Development

The successful bidder will be required to develop an annual Media Plan by August of the following fiscal year that is consistent with and furthers Lottery's Marketing Plan. For example, Lottery's fiscal year ends June 30, 2020, the successful bidder will provide the advertising media plan by August 31, 2020 (for fiscal year 2021). The Media Plan must support Lottery brand, games, promotions, and initiatives. The successful bidder, along with Lottery vendors, may have input into the development of the Marketing Plan, but Lottery has the sole authority for development and implementation of the Marketing Plan. The Media Plan must be submitted to Lottery for approval. The plan will be reviewed at least once per quarter and must be revised as required by changes in the Marketing Plan, economic factors, other market conditions, or as desired by Lottery. The successful bidder must submit a new Media Plan in support of each new yearly Marketing Plan adopted by Lottery.

The Advertising Plan must detail all campaigns planned during each fiscal year, including budget estimates. Lottery recognizes that all plans are subject to change based on current market realities. The advertising plan must also provide a breakdown of proposed spending by media type and proposed production costs.

In addition to the advertising plan, the successful bidder will be required to develop a Communication Plan. The plan will include Public Relations events, contingency strategies, and expected budget requirements.

Advertising Sensitivity

The Lottery is an agency of the state of Washington. As such, all advertising campaigns must be in good taste and must not make unsubstantiated promises.

Lottery advertisements or promotions must not be of a nature that unduly influences any person to purchase a Lottery ticket or number of tickets. Specifically:

1. There must be sensitivity that some people may be inclined to spend more money than they should when gambling.
2. Advertising must not encourage people to play excessively, and must adhere to Lottery regulation and policy in stating the odds of winning and disclaimers when applicable. No attempt shall be made to conceal or misrepresent those odds.
3. Responsible Gambling initiatives should be considered in all modes of communication.

The successful bidder must adhere to Lottery's adopted advertising guidelines when developing any marketing program for Washington's Lottery.

Washington's Lottery Advertising Guidelines

- Lottery players and Washingtonians must be represented in a positive manner
- The use of humor is acceptable, however, humor must not be at the expense of a person's gender, race, religion, emotional or psychiatric state, political position, family situation, financial position, job status, or place of birth or residence
- Lottery games must be advertised responsibly and realistically. Players must not be misled by promising riches, a drastic life change, or an easy win
 - Do not promote Lottery games as the cure for financial problems or a retirement plan
 - Always encourage responsible play
 - Promote Lottery games as a form of entertainment
 - Do not create advertising that is especially appealing to minors
 - When reasonable, promote the benefits of Washington in Lottery advertising (for example, Washington's scenic beauty, agricultural products, and other products)
 - Respect Washingtonians and Lottery players. Create advertising that demonstrates that the Lottery is advertising and operating responsibly.
- Advertising must not include specific efforts to market to vulnerable adults, particular racial or ethnic groups (other than direct translation of English marketing products), persons living at or near poverty level, and/or any other socio-economically disadvantaged persons

Collateral Material and Signage

Collateral Materials The successful bidder will be responsible for the creative design and production of printed materials produced in support of Lottery's advertising efforts and will be approved by the Lottery. This requirement includes, but is not limited to, such items as posters, displays, and other POS items intended for temporary use. The successful bidder may be required to produce an Annual Report, retailer newsletters, or other printed items. Lottery owns all original artwork, layout, design, and final product and can use as needed.

Printers The successful bidder must obtain competitive bids on all print jobs. The successful bidder shall make every effort to ensure opportunities to bid on the printing of Lottery materials are made available to suppliers in all parts of Washington State.

Signage The successful bidder may be required to design and produce interior and exterior signage, which identifies retail locations as Lottery retailers.

Conventions/Trade Shows/Special Events/Meetings

The successful bidder must be familiar with all aspects of the Lottery that can affect the successful bidder's ability to effectively service the Lottery account. The successful bidder will be required to attend various conventions, trade shows, special events, and meetings at the successful bidder's expense.

The successful bidder's staff (at least one person) shall attend a minimum of three Lottery industry conferences on an annual basis. All travel-related expenses are the responsibility

of the successful bidder. In addition, the successful bidder's staff shall attend Lottery Commission meetings, held six times per year, in order to better understand the goals and needs of Lottery.

Contract Requirement: Each contract year, at the expense of the successful bidder, deducted from the agency fee, four trips for Lottery staff will be available for marketing specific purposes such as meetings, conferences, and trade shows. The purpose of these trips is to provide Lottery personnel with access to the most current marketing/branding/advertising information available and to remain abreast of industry trends and best practices. The successful bidder shall reimburse the Lottery for travel-related expenses (up to Washington State per diem rates) and conference registration fees, if applicable. Any unused trips will roll over to the next contract year.

Co-Promotions

The successful bidder may also be required to solicit and encourage joint advertising and promotional opportunities with other Washington entities. Such ventures shall not be exclusive, unless a general solicitation has been made to all possible co-promoters offering comparable goods, services, or opportunities. The successful bidder must indicate the potential benefits to the Lottery from any co-promotion recommended.

Media Planning and Buying

The successful bidder must develop specific media plans for each campaign that are cost-efficient and effective in providing Lottery with the desired reach and frequency for all Lottery products. Media Plans must take into consideration all media outlets in Washington State.

Bonus Commercials

The successful bidder must attempt to negotiate free bonus spots or additional promotional support from all radio and TV stations included in a Lottery buy. Any bonus spots or additional promotional support provided by participating stations must be identified in the summary of any media buy, and the value of the bonus spots or additional promotional support must be calculated as an added value to the Lottery.

Negotiation and Placement

The successful bidder will be responsible for the negotiation, purchase, and instructions for the placement of all media time and space. The successful bidder will not commit the Lottery to any such purchase without first obtaining the Lottery's written approval. In negotiating media purchases, the successful bidder shall make the Lottery aware of any savings that might be achieved through long-term commitments or other special programs. Any such commitments must be approved by the Lottery and any savings achieved must be passed on to the Lottery.

Placement Verification

The successful bidder must notify the Lottery before approving any "make goods" for ads that did not run as scheduled. All such materials shall be maintained by the successful

bidder and must be available for inspection by authorized Lottery representatives. Affidavits and tear sheets must accompany any final billings.

Post-Buy Analysis

The successful bidder will be required to provide the Lottery with post-buy analyses indicating that the reach and frequency goals of each buy were achieved within budget. In addition, post-buy analyses must be provided for media buys that use new rating information for the buy period, when available.

Spending Analysis

No more than 30 days after completion of each media campaign, successful bidder must provide Lottery an analysis of the media campaigns initial goals and metrics met, and a description of any issues with bidders and resolutions if any. Each analysis must include a recommendation regarding proposed changes in media purchasing for future campaigns.

Media Services

The successful bidder shall be responsible for developing and updating an annual or campaign Media Plan, for negotiating and placing Lottery materials effectively and efficiently, and for verifying actual placement as required by Lottery. More specifically:

- If requested by Lottery, the successful bidder shall develop a plan that maximizes results, achieves specific objectives, and supports creative and other strategic direction to provide measurable results. The plan could include such elements as an identification of when and what type of media should be written and placed, time schedules for identifying and analyzing demographic market and delivering media coverage, and a means to determine the effectiveness of the media campaign.
- The successful bidder shall be responsible for the negotiation, purchase, instruction, and delivery of materials for the placement of media time and space.
- In negotiating media purchases, the successful bidder shall make Lottery aware of any savings that might be achieved through long-term commitments or other special programs. Any such commitments shall be approved by Lottery and any savings shall be passed on to Lottery.
- When Lottery is contacted by a company offering media or promotional opportunities for Lottery, Lottery will direct the inquiring party to provide the information to the successful bidder. For all opportunities recommended by the successful bidder, a written evaluation shall be provided to Lottery in context with Lottery objectives and strategies.
- The successful bidder shall have a process in place to reply to each inquiring media party. This will be available for review by Lottery upon request.
- The successful bidder shall implement a system to ensure that all media was run or published according to any contracts or placement instructions.
- The successful bidder shall notify Lottery before approving any make goods for any ads that did not run as scheduled. All such materials shall be maintained by the successful bidder and shall be available for inspection by Lottery or authorized Lottery representatives.



- The successful bidder shall submit to Lottery any invoices for paid media advertising or campaigns in a timely manner. Affidavits and tear sheets must accompany any final billings.
- Lottery may at any time cancel, at no cost, any space or time previously authorized for publication or broadcast provided the publisher or other owner of said space or time will accept such cancellation without financial penalty. Lottery may also cancel any space or other time previously authorized for which there is a cancellation penalty, but such penalty shall be paid by Lottery.
- The successful bidder shall present alternative outreach options to Lottery such as, but not limited to: bus posters, movie theaters, or outdoor placements.

Web Management

The successful bidder will be responsible for working with previous contractor to transfer all software, functionality, and design of the Lottery's existing website, mobile application, and interactive video wall, and backend processing in its current technology (.NET 4.5 and SQL 2014). The successful bidder must agree to pay the existing contractor for any time required beyond the transition period to produce a fully functioning and error-free website. During the transition period, the current website will run in parallel to the new website until new site meets accuracy and reliability standards. The successful bidder must be thoroughly familiar with our website content and be able to provide services including, but not limited to, hosting, maintaining, troubleshooting, updating and development of new features.

XML Data Feed

Ability to dynamically import multiple Lottery XML files into existing website database for display on Lottery website and mobile app.

Winning Numbers

- Display winning numbers on homepage and Winning Numbers page
- Ability to Check Your Ticket

My Lottery 360°

- Maintain communication and integration with third-party application vendors
- Lottery administrator must have ability to send geo-targeted and user preference based promotion emails and push notifications in an html or other web technology format
- Deliver automated winning number emails and push notifications

Geo Promo Tool (promotional addition to My Lottery 360° emails)

- Include promotional images and messages to My Lottery 360 members in winning numbers emails
- Able to designate by region and/or statewide

Custom Email Tool (promotional addition to My Lottery 360° emails)

- Include promotional images and messages to My Lottery 360 members
- Able to designate by region and/or statewide

My Lottery 360 Promotions

- Lottery administrator must have the ability to add promotions, setting start and end date, add image, add body copy
- Promotions area to display promotion information including link to participating retailers in Where to Play

Where to Play

- Ability to search by Store Name, City, and Zip Code
- Ability to filter retailers by promotions

Winners' Gallery

- Dynamic sortable list of winners with the ability to add information such as press releases and photos
- Search function
- Dynamic running totals of prizes awarded for each game

Ad Rotator

- Feature homepage image rotation to display graphics
- Lottery administrator must have the ability to add images, setting start and end dates

High Jackpot and Winner Image Automation

- Based on specific amounts, images need to dynamically post to homepage to display next jackpot amount or if there was a winner
- jackpot alert needs to post after drawing no later than 30 minutes after the amount is provided
- Winner alert needs to post for 24 hours after drawing

New Game Development / Old Game Removal

- Add and delete images, pages, and information to coordinate with product schedule
- Stay consistent with look and information available with other games
- Add and remove games to Check Your Ticket accordingly

Game Information

- Display game rules, how to play, FAQ, how to claim, etc.
- Dynamically display jackpot selling stores, frequency of numbers drawn, past winning numbers, and current draw and jackpot information
- Dynamically display *Scratch* game information and prizes remaining based on a nightly data feed
- New scratch games loaded to admin tool dynamically
- Lottery administrator must have the ability to add scratch artwork, and determine which games are "Feature" games
- Lottery administrator must have the ability to determine which games go live and order of display

Beneficiary Support

- Display contribution copy and links
- Display distribution graph (pulled from Annual Report)
- Display and provide links to Annual Report PDFs

About Us

- Lottery administrator must have the ability to navigate through multiple topics, including but not limited to employment opportunities, commissioners, meetings, legal info, etc.
- Lottery administrator must have the ability to add and edit content to any of these topics

Game Shutdown

- This tool is used to disable the access to the drawing results of a selected game. By turning off a game, several things will happen for this game:
 - On the homepage the game's winning numbers will be replaced by a message letting the user know that the results are currently not accessible and to check back later.
 - The Winning Numbers page will display the same message in the corresponding game's section.
 - The rss feed will display no winning numbers and a message to check back later.

Lottery Administrator Tool

- The successful bidder will house, develop, and support an administrative website where Lottery web team can log in to view reports, access help files, and update pages. The Lottery administrator must have the ability to publish to the live server multiple times within a day. Bidder to provide up to date system and user documentation accessible from the admin tool at all times.

New Features

The successful bidder to design and implement new features as Lottery requests. The successful bidder also to present possible enhancements for Lottery consideration. For example (but not limited to):

- Lottery directed enhancements, such as database organization, online registration/entry and updates to XML files from Gaming System or integration with API's from other vendors
- Winner file upload from 2nd chance drawings
- Legislatively required voluntary self-exclusion program

Hosting

- The successful bidder is responsible for purchasing or leasing all necessary equipment to provide the following services equal to or above existing levels. The web environment should include:
 - Mirrored environments in two geographically diverse locations providing a fully functional backup site that mirrors the live site including all backend processes and provide seamless failover.



- Server with current, patched, and supported Server Operating System no more than 36 months old running on Enterprise, Server Grade Hardware
- The capability of serving an average of 30,000 visits a day, and ability to elastically scale to 125,000 or more visits during high jackpot periods.
- The successful bidder is responsible for development, maintenance, administration, and performance tuning of all servers
- The successful bidder is responsible for backing up website content and backend databases. Daily backups are to be retained for at least 2 weeks and restoration tested at least once a month.
- The successful bidder is responsible for Domain Name Software (DNS) management including failover, load balancing, Domain name purchase, mail services, etc.
- The successful bidder will work with Lottery and State IT Regulatory staff when and if Lottery determines it best to assume ownership of website and DNS Hosting. In this case, the successful bidder would work on transitioning account ownership or migration to a Lottery owned account without impact to site availability. Site management would then remain the successful bidder's responsibility.

Security and Disaster Recovery

- The successful bidder must adhere to Office of the Chief Information Officer (OCIO) policies 141 and 141.10. These documents can be found by following this URL (<https://ocio.wa.gov/policy/securing-information-technology-assets>). A letter verifying that the apparent successful bidder is in compliance with these requirements must be submitted to Lottery's Chief Information Security Officer (CISO) on or before June 1 annually.
- The successful bidder must ensure all web pages are prepared to prevent Cross Site Request Forgery and Cross Site Scripting. This test should be done anytime a new feature is added to the web page.
- At any time a new software feature is going to be added to the web page, fuzz testing or fuzzing must be completed prior to implementation. Documentation of fuzz testing will be retained as long as the software remains on the website.
- The successful bidder will also complete a security audit once a year and a security assessment at a minimum of once every three (3) years. Findings of the security audit and the security assessment must be provided to Lottery's CISO within 30 days of finishing the assessment or audit.
- Data collected from this website, when at rest, must be encrypted with a whole disk encryption utilizing AES-256 or equivalent.
- The successful bidder must ensure web pages complies with Washington State's laws in regards to protection of individual privacy protection. Executive Order 16-01 Privacy Protection and Transparency in State Government "Modernizing State Agency Privacy Protection," can be found at this URL (http://www.governor.wa.gov/sites/default/files/exe_order/eo_16-01.pdf).
- The successful bidder must provide Lottery Security and Lottery CISO with an electronic copy of their internal security plan and disaster recovery documentation within 30 days of being declared the ASB. These documents shall be reviewed at least annually and Lottery's CISO must be notified of any significant changes to the apparent successful bidder's network security infrastructure between annual reviews.

Performance/Reliability

- The successful bidder is responsible for utilizing appropriate methods to minimize page load time as well as backend process performance
- The successful bidder to maintain minimum Website/Server up time of 98 percent within 30 days
- The successful bidder to maintain data/content accuracy minimum of 98 percent for a 30 day period
- The successful bidder's system will send winning numbers emails to My Lottery 360 subscribers within 30 minutes of Lottery successfully sending data file. The successful bidder will maintain minimum of 98 percent accuracy/timeliness within a 30 day period.
- Reliability reports must be provided quarterly and include the items listed above

Web Analytics

- The successful bidder to provide analytics for site tracking.
- The successful bidder to provide monthly campaign reporting.
- The successful bidder to provide additional reporting upon Lottery request.

Mall Touch Screen

This is a 5,760 pixel by 3,240 pixel touchscreen unit that is comprised of nine individual screens that act as one large touchscreen interface. The successful bidder shall:

- Maintain Data Connectors with existing Lottery APIs to insure data uniformity in tandem with all other Lottery digital mediums (web site, billboards, mobile app, LVMS)
- Manage as a web app to run on the ActiVia platform: touch screen interactions, business logic, navigation routing, 2-D and 3-D animations, and CMS integration
- Manage Touch Explorer with multi-touch and touchpoint radius detection support.
- Manage asset caching and performance tuning for application running continuously all day
- Manage strategy and performance tuning for high-frame-rate animations on a 5760x3240 browser window
- Create the entire look and feel of the experience, to include: icon designs, the artwork look and feel, menu pop-up designs, and the actions that would happen on the screen when someone touches it
- Maintain ADA compliant design and execution
- Maintain backend process to push content from test to production

Menu Boards

These are running on two 3840x540 video screens. The successful bidder shall:

- Maintain business rules document for the screens
- Manage and recommend content updates
- Manage API connections with third party sign vendor for the jackpot amounts

- Plan out in detail the content that will run the entire time the store is open

Other Services

Bidders should describe in detail any other services proposed to be provided to Lottery that are not specifically addressed in this RFP. Bidders should also specify how those services will assist Lottery in achieving the best value and furthering its mission.

Promotional Items

The successful bidder may be responsible for the design, production, and delivery of merchandising items approved by Lottery (such as t-shirts, key chains, hats, and a variety of other items that may be used as retailer or consumer premiums). The successful bidder will be expected to present a minimum of two bids and recommend to Lottery a cost-effective program to make merchandising items available for promotions.

Public Relations

The successful bidder shall provide:

- Comprehensive public relations/communications consultation, advice, and recommendations
- Assistance in the development and execution of communications plans
- Media relations counsel and response
- Media/presentation training
- Crisis communication planning and response
- Winner awareness programs
- Responsible gambling education and awareness initiatives
- Corporate/community outreach planning
- Beneficiary communications
- Event and promotion support for product awareness
- Corporate and community outreach
- Assistance with Web services management as needed

The public relations component will include product support and corporate communications support.

The successful bidder shall provide the following product (marketing) and communication support services:

Product (Marketing) Support:

- Consultation, advice, and recommendations for the Lottery.
- Preparation and implementation of a product promotions plan that parallels and complements the objectives of Lottery's marketing programs.
- Coordination with Lottery and successful bidder personnel to ensure a good public relations focus during promotions and marketing events.
- Provision of support for publicity, special events, and public relations for programs in the Advertising Plan and the Communication Plan.



- Evaluation, recommendations, and implementation support for partnerships and additional consumer promotions.
- Development of corporate and community-based communication programs as described in the approved Advertising Plan and the Communication Plan.

Comprehensive Corporate Communications Support:

- Development of strategic communications and comprehensive stakeholder plans:
 - Short-term: 1 year/Biennium; and
 - Long-term: 3-5 years
- Provision of consistent, on-going public relations and media relations counsel
- Support Lottery leadership with internal and external communications planning and development
- Support for media relations efforts, including:
 - Development of plans for online newsroom, editorial board calendars, key message development, opinion editorials, stories, articles, features, news conferences, and news release distribution
 - Provision of media training and speakers/presentation training for the Speakers Bureau development
 - Back-up media relations response to Lottery staff for press releases, press events, crisis situations, jackpot notification to media, and related activities, and
 - Senior staff member to review all external communication before it is delivered to Lottery to ensure the document is accurate in content, tone, punctuation, and grammar
- Development of an overall Crisis Communication Plan
- Development and/or implementation of an enhanced statewide Winner Awareness Plan
- Assistance with the development and support of a comprehensive education and awareness program for responsible gambling initiatives, including securing support for the development of new responsible gambling television and radio public service announcements (PSAs)
- Development of a full community involvement/outreach program that enhances Lottery's mission and creates a positive image of the Lottery in Washington communities
- Development of a beneficiary communications plan that includes enhancing partnerships with key education organizations and differentiates Lottery from other gaming/entertainment options by showing how Lottery supports Washington (specifically Washington education). Review and assessment of the best methods to communicate where Lottery dollars go.
- Supporting events and promotions for corporate and community outreach programs
- Assistance with Web services management as needed for development and content

Public Service Announcements

Because Lottery is a state agency, the successful bidder may be required to develop informational materials to be provided to media outlets as public service announcements to run at no charge to Lottery on an annual basis. The successful bidder must develop a plan

to achieve media acceptance of these materials, propose low-cost production of these materials, and provide Lottery with a periodic report on the reported usage of such materials.

Research

The successful bidder shall:

- Work with the Lottery Contract Manager to identify advertising and marketing issues and to assist in formulating strategies, as needed
- Conduct focus group testing of advertising concepts for major campaigns, brand positioning, product, or other marketing-related issues
- Conduct other formal market research for concepts, as required by Lottery
- Schedule meetings quarterly (or as needed) with Lottery staff to share consumer feedback obtained through Account Planning/Research fieldwork activity
- Lottery will own all research results, materials, and databases generated on behalf of Lottery

Retailer and Regional Visits

At the direction of Lottery, the successful bidder may be required to send personnel to visit Lottery retailers to review POS material and provide feedback on effectiveness or elicit retailer comments.

All personnel identified as working on the Lottery account may also be expected to visit regional offices as directed by Lottery.

Retail Marketing Support

The successful bidder shall:

- Develop and produce POS materials to complement advertising campaigns based on the approved Advertising Plan and the Marketing Pla.
- Assist Marketing staff to develop a comprehensive POS program, including developing a POS package for retailers
- Assist in developing POS for use at fairs, events, or other promotions as needed and directed by Lottery
- Coordinate and support the development of materials at Lottery's direction.
- Develop brand and promotion/game enhancement POS as described in the approved Advertising/Marketing Plan
- Develop a comprehensive POS program, including new elements for increased exposure on Lottery vending machines and other hardware enhancements
- Assist in integrating Corporate Account POS needs into the general POS program as directed by Lottery
- Provide coordination and logistical support in the development of sell-in materials for non-English speaking retailers as directed by Lottery
- Assist in the development of retailer information sheets or other communication vehicles
- Develop promotions and programs that are focused on increasing Lottery traffic in retail and event locations

Strategic Planning

The successful bidder shall:

- Develop strategic communications and comprehensive stakeholder plans:
 - Short-term: 1 year/Biennium; and
 - Long-term: 3-5 years
- Provide ongoing strategic counsel for Lottery's core products and corporate brand by providing direction on Lottery initiatives, marketing, communication, strategic frameworks and development issues.
- Create an annual Advertising/Marketing Plan for Lottery's fiscal year advertising and promotion campaigns based on Lottery's marketing plans.
- Participate in the development of annual Lottery marketing plans.
- Assist in situation analysis and development of overall goals, objectives, and strategies.
- Advise Lottery regarding advertising, marketing, communications, and sales opportunities via the Internet, social media, and mobile; assist as needed with website and other e-business advertising, marketing, and sales development.
- Develop an Advertising/Marketing plan using minority and local community media.
- Provide a weekly status report to Lottery-designated Marketing and Sales managers and a weekly conference call reporting on all actionable initiatives.
- Provide insight and counsel, as directed by Lottery, in further development of the use of technology (software and hardware), social media, and mobile.
- Perform quarterly field market checks to provide Lottery with additional strategic feedback on products and programs.
- Perform monthly statewide media clip reports to monitor issues/opportunities relevant to Lottery.
- Perform quarterly media impression reports to track unpaid/earned media.

Staffing

Lottery requests that the requisite projects and assignments are completed in a timely, efficient, and creative manner, and that all essential services are fulfilled. The successful bidder will provide a high level of service through a team that has the necessary experience and skills to get the job done. The successful bidder will be expected to staff the Lottery account through appointment of qualified individuals for the management of the Lottery account.

Bidders are to include resumes for the following five positions:

Account Executive

- Minimum five years' of advertising account experience

Account Director

- Minimum two years' experience
- Experience managing and directing major advertising accounts
- Senior level position; preferably a principal who reports to the CEO or President of the successful bidder

Note: Either the Account Director or Account Executive must have at least two years of public relations and promotions experience

Creative Director

- Minimum two years' experience
- The Lottery requires at least one creative professional as a designated team member. This person should be a senior level professional who reports directly to the chief creative professional

Social Community Strategist

- Minimum of two years' experience of cross channel execution planning
- Proficient in strategic deliverables including:
 - Scope of work
 - Social listening
 - Content planning and
 - Key Performance Indicators
 - Develop relevant content topics to reach the target customers

Public Relations Account Director

- Minimum five years' experience.
- Experience managing and directing major public relations/communications accounts.
- Strong experience in media relations.
- Efficient in proofreading and grammar.
- Proven experience in crisis communications for two or more major accounts.
- At least one position with 20% time commitment to the Lottery account.
- Senior level position - preferably a principal who reports to the CEO or President of the successful bidder.
- Government and public affairs experience required. Established media relationships required.

This procurement calls for many different available disciplines, promotions, events, and interactive/digital marketing. The successful bidder must be able to provide these services and the associated personnel required to implement Lottery initiatives. **Bidders must provide a proposed staffing plan that would best meet the needs of this RFP.**

Below is an example of additional positions utilized in the past:

- Media Director
- Media Planning Staff
- Account Planning Staff
- Junior Account personal
- Creative Team Members
 - Producers
 - Copywriters
 - Art Directors



MARKETING AND ADVERTISING SERVICES

- Production Artists
- traffic personnel
- Public Relations Account Executives
- Billing Coordinator

Employees assigned to the Lottery account must have significant experience with products and marketing issues similar to those offered by Lottery. Staff account experience is preferred in retail grocery and convenience stores merchandising,

Brand development, awareness and research is vital to Lottery. The successful bidder must have a competent team with appropriate staffing levels and a cost-effective mix of experienced and less experienced personnel led by a dedicated Account Supervisor and Creative Director.

Staff account experience is required in brand development, product support, and beneficiary awareness, across all media and social channels, including an understanding of both product and consumer research and knowledge of merchandising at a variety of retail environments.

The staff assigned to the Lottery account should be those who best meet Lottery's needs based on the Scope of Work.

Upon the successful bidder's need for staffing changes, the successful bidder shall notify and consult with Lottery to ensure qualified individuals are assigned to fulfill the Lottery contract. All personnel dedicated to the Lottery contract (regardless of position) are expected to become knowledgeable about the Lottery business, the political environment within which Lottery operates, and the products offered by Lottery. All personnel dedicated to the Lottery are expected to visit Lottery retailers upon request, as described above.

Lottery will have the right to request removal of staff within nine (9) months of the appointment of newly assigned staff if determined that the individual is not a good fit for the Lottery account.

Washington's Lottery Orientation

All successful bidder personnel assigned to the Lottery account will be expected to be thoroughly familiar with the Lottery's enabling legislation (chapter 67.70 RCW), rules (Title 315 WAC), chapter 42.52 RCW Ethics in Public Service), chapter 42.56 Public Records Act, the Lottery's history, products, marketing plan, and operating procedures as they relate to any services, products, or activities provided by or in conjunction with the successful bidder. This includes knowledge of all aspects of this procurement and the successful bidder's bid. All such personnel must be thoroughly oriented and possess this knowledge prior to being assigned to work on any aspect of the Lottery account.

C. ADMINISTRATIVE PROPOSAL

(400 points)

In the Administrative Proposal scored evaluation, the evaluation team will assess the bidder's general qualifications and experience as a contractor successfully providing services in connection with Lottery's [Scope of Work](#). The evaluation team will also determine whether the bidder has a proven track record for delivery of quality services, and the potential to consistently deliver such services, over the life of the contract. The evaluation team will assess the effectiveness of the proposed leadership and staff, and staffing plan, in the context of the requirements related to providing services on the scale represented in this RFP, and the relevant qualitative and quantitative experience of proposed key personnel and subject matter experts who will be responsible for bidder's delivery of services for the contract.

Considerations include, but are not limited to, whether a bidder has a company profile that reflects the bidder's present experience, qualifications, and resources to provide superior services now; and the capacity to consistently provide such services as required in the RFP and in a resulting contract over the life of the resulting contract.

Bidder must provide a clear and concise response to each criterion listed in this section. It is preferable that bidder restate the criterion, then respond below the criterion description.

Bidder Experience and Expertise

1. Provide an assessment of the bidder's core expertise and any other services that the bidder will offer to Lottery's account and the reason why bidder is the best fit for the work.
2. Provide number of years of business experience providing the same or similar services as described in [Scope of Work](#). List the account names and number of years' experience with each account.
3. Provide a current client list and the percentage of total billings represented by each.
4. Provide a current Dun and Bradstreet credit rating (or other generally accepted credit verification)
5. Describe the system the bidder uses to ensure accurate client billing and cost monitoring.
6. Indicate whether the bidder currently has, or has in the past three (3) years, contracted with another government entity and explain the type of services performed under the resulting contract or project work as it relates to this scope.
7. Identify all new clients that have awarded a contract or project to bidder during the past three (3) years. Identify any client relationships that have ended during the past three (3) years. The clients identified in bidder's response to this section may be contacted by Lottery as a reference.
 - a. For new clients, list by each client name the services that were, are, or will be provided and length of each project or contract.
 - b. For ended client relationships, list by each client name the services delivered, and length of project or contract.



- c. Provide bidder's total dollar billings, excluding media buys billings, for the last two (2) calendar years and provide the percentage of billings in each of the following areas: television, digital and social media, radio, print, out of home, collateral, email, and other, during that time period.
- d. List any industry awards or achievements received during the past three (3) years.
8. Identify where Lottery will fit within your current client roster in terms of size, scope, and marketing products.
9. Explain bidder's capabilities and experience for the following items.
 - a. Account planning (how it interfaces with the departments or areas of the bidder's organization)
 - b. Research
 - i. Maintain an independent research method stance (so as to not influence the overall outcome of research regarding campaigns or promotion initiatives)
 - ii. Consumer testing (focus groups, surveys, etc.)
 - c. Strategic planning and brand management
 - d. Creative development (list types)
 - e. Media planning and buying (include planning and buying process and how you would ensure that Lottery received the maximum value for its dollars)
 - f. Promotions planning, event activation and implementation
 - g. Interactive (Internet/web development)
 - h. Production services (list types)
 - i. Public relations: product support
 - j. Public relations: corporate image support
 - k. Public relations: crisis communication planning and response
 - l. Media relations
 - m. Community outreach development
 - n. Logo development
 - o. Web service management
 - p. Social media
 - q. Mobile marketing
 - r. Other (include any service you would like to ensure Lottery is aware of)

Contract Team and Key Personnel

Note: Lottery reserves the right to review and/or disapprove of any employees before assignment to any Lottery contract. In addition, all employees associated with the resulting contract will be required to fill out Lottery's background investigation packet. This is consistent with Lottery's policy for contractors providing sensitive goods and services.

1. Provide staff names of all full time project and key personnel (key personnel may include freelancers/subcontractors), who will be assigned to perform services for Lottery's account along with the following information:
 - a. Job title
 - b. Brief description of proposed role and responsibilities under Lottery's account

- c. Identify whether any key persons assigned to perform services for Lottery are subcontractors/freelancers
2. Provide a detailed resume for each key personnel identified above. All resumes should identify the number of years working at bidder's business, additional years of relevant experience working at other businesses, and summarize the expertise/knowledge in the areas relevant to each key personnel's proposed assigned role and responsibilities on Lottery's account.

Business Approach and Processes

1. Describe bidder's approach to client relationship building and account management.
2. Describe bidder's approach to on-boarding and understanding client products and brands.
3. Describe bidder's approach to remaining current on industry trends and on specific categories of advertising and how bidder's knowledge of those current trends have enabled bidder to better understand bidder's client's business and advertising needs.
4. Describe bidder's approach to effective, day-to-day project communications between the parties.
5. Describe bidder's approach to ensuring a high-level of transparency for reporting, and keeping Lottery informed of all projects or campaigns timelines and due dates, including key issues, approvals, decisions, and developments throughout the contract.

Scoring the Administrative Proposal - below are the guidelines the Lottery's evaluation team will follow while scoring responses.

400 points	If a bidder excels in addressing items within their Administrative Proposal regarding Experience/Expertise, Project Team/Key Personnel, and Business Approach/Processes required.
200 points	If a bidder is sufficient in addressing within their Administrative Proposal, the Experience/Expertise, Project Team/Key Personnel, and Business Approach/Processes required.
100 points	If a bidder addresses the necessary points within their Administrative Proposal but fails to achieve a level of accomplishment in describing how it will perform under the contract.

D. ADDITIONAL QUESTIONS

(300 points)

Note - Please provide a headline answer and supporting copy not to exceed 1000-character count per question.

1. How does your agency differ from the agencies with whom you usually compete? Please be specific and provide examples if possible.
2. How would you describe your company culture? What is the overall philosophy you operate by? Please provide specific examples of how you exemplify it in your agency.
3. Indicate, (at a high level, and as appropriate) how you integrate digital work, or that of multiple communications channels, into your approach. What role does data play for your agency?
4. Describe the kinds of accounts or categories in which you believe you have special strengths.
5. How do you manage client communications, collaboration, and what do you think makes a client good to work with and what makes a client frustrating to work with?
6. How do you determine how you will integrate a social media strategy across multiple channels for a major ad campaign?
7. Diversity is important to Lottery; tell us about a campaign that communicated across multicultural and diverse audiences in a culturally competent and effective way.
8. Please tell us of specific example of your agency and a client regarding the planning and development of a marketing campaign where you both were in alignment at the start, and then new information came to light, that had the agency and client at odds on how to continue. How did you resolve this issue and what was the outcome?
9. What is your creative process? How do you allocate staff, establish timelines, and ensure you stay on track?
10. Provide an example of a crisis communication plan you developed, and the outcome, based on a business with at least a statewide profile.

Scoring Additional Questions - below are the guidelines the Lottery's evaluation team will follow while scoring responses to each question.

30 points	Bidder fully answered the question.
15 points	Bidder answered most of the question
7.5 points	Bidder did not answer question effectively

E. CASE STUDY

(900 Points)

For each of the case studies listed include the following format:

- Title
- Client
- Team members
- What you are solving for
- The solution - include expected KPIs
- The results
- Visuals

Bidder must provide a response of no more than three (3) single sided, 8.5” x 11” pages for each case study. At a minimum, the case study should succinctly state the objective, strategies, and outcomes associated.

Lottery will lower the Administrative Proposal score by twenty five (25) points per each additional page. **Illustrative Case Study Samples must be provided in .pdf format via thumb drive only. Illustrative case study samples provided as hard copies or links to the web will not be accepted and may disqualify potential bidders who submit them.**

1. Tell us about a campaign that your team is proud of that increased brand awareness and likability.
2. Tell us about a campaign where the objective was to increase product sales at convenience stores, that measurably shifted the needle and increased sales for a particular consumer product.
3. As a government agency our proceeds help benefit education through Washington’s Opportunity Pathways Account. It is difficult for us to share the value of those contributions, because we can only share overall dollars provided, not an actual person, people, or community that benefit. Tell us about a client who had similar issues, and how shared their story to elicit an emotional connection between the dollars contributed and those impacted.

Scoring Additional Questions - below are the guidelines Lottery’s evaluation team will receive while scoring responses to each case study.

300 points	Bidder clearly demonstrated it has successfully completed a project within the parameters.
150 points	Bidder demonstrated it has successfully completed a project somewhat related to the case study question.
75 points	Bidder has completed a project unrelated to the case study question.

F. EXHIBITS

EXHIBIT TITLE	FILE
EXHIBIT A - ADDITIONAL INFORMATION <i>Information regarding Lottery demographics, sales, fund distribution etc.</i>	 Exhibit A - Additional Informati
EXHIBIT B - BIDDER PROFILE <i>Complete, sign and include with proposal</i>	 Exhibit B - Bidder Profile .docx
EXHIBIT C1 - CERTIFICATION AND ASSURANCES <i>Complete, sign and include with proposal</i>	 Exhibit C1 - Certification and As:
EXHIBIT C2 - WAGE THEFT CERTIFICATION <i>Complete as instructed and include with the proposal</i>	 Exhibit C2 - Wage Theft Certification.d
EXHIBIT C3 - CERTIFICATION FOR EO 18-03	 Exhibit C3 - Certification for EO
EXHIBIT D - PRICING PROPOSAL <i>Complete as instructed and include with the proposal</i>	 Exhibit D - Pricing Proposal.docx
EXHIBIT E1 - CONTRACT <i>For information only, do not include with the proposal</i>	 Exhibit E1 - Sample Contract.docx
EXHIBIT E2 - CONTRACT ISSUES LIST <i>If applicable, complete as instructed and include with the proposal</i>	 Exhibit E2 - Contract Issues List.
EXHIBIT F - COMPLAINT, DEBRIEF, & PROTEST REQUIREMENTS <i>For information only, do not include with the proposal</i>	 Exhibit F - Complaint Debrief P
EXHIBIT G - DOING BUSINESS WITH THE STATE OF WASHINGTON <i>For information only, do not include with the proposal</i>	 Exhibit G - Doing Business with the St