



## Request for Proposals for Marketing Research Services

MAY 4, 2018

## 1 Introduction

The Illinois Department of Lottery [www.illinoislottery.com](http://www.illinoislottery.com) awarded the Private Management Agreement (PMA) to Camelot Illinois on September 22, 2017 following a bid submission. Following the Notice of Award, the PMA was executed on October 13, 2017.

Camelot Illinois, as part of an overall business strategy, intends to assist the Lottery in growing revenue. Although specific projects have not been identified yet, Camelot Illinois will carefully review the capabilities and thought leadership of full-service market research service providers so that Camelot Illinois can call upon them when project needs arise.

Camelot Illinois anticipates running the following types of research:

- concept testing/white space development
- ad testing
- marketing analytics
- segmentation
- 1:1 interviews
- focus groups
- shop-a-longs with eye tracking
- game innovation
- brand tracking
- communications checks
- data analytics
- syndicated data acquisition
- hopper insights
- multi-cultural insights
- survey capabilities
- eye tracking
- virtual reality/augmented reality
- technology trends in research, qualitative research capabilities
- online research capabilities

*(collectively the "Services").*

The contracts entered into pursuant to this Request for Proposals ("RFP") will support the transition and growth plans of Camelot Illinois, as various Services shall be required across marketing, retail, and sales.

As such, the goal of this RFP is to enter into one or more contracts with market research companies (Vendor(s)), who will provide Camelot Illinois, Services on an on-going and as-needed basis. Notwithstanding the foregoing, Camelot Illinois will award Vendors specific marketing areas for contracting purposes under this RFP.

## 2 Instructions

This RFP invites interested organizations to submit a response (“Proposal”) to this RFP to Camelot Illinois.

The [requirements](#) for this RFP are set forth in Section 7.

### 2.1 Timetable

Proposals should be submitted by Friday, June 1, 2018 at 12:00 pm CT to the attention of: [procurement-services@camelotillinois.com](mailto:procurement-services@camelotillinois.com)

The headline RFP Proposal milestones are as follows:

Issue RFP	Friday, May 4, 2018
Last Date for Vendors’ Questions	Friday, May 11, 2018 by 5:00 pm CT
Vendor intends to submit a Proposal	Monday, May 21, 2018 by 5:00 pm CT
Answers to Vendors’ questions posted	by Tuesday, May 22, 2018 (updated)
<b>Proposal submission date</b>	<b>Monday, June 4, 2018 by 5:00 pm CT (updated)</b>
Estimated Date of Award (subject to contract)	by Friday, June 15, 2018

Camelot Illinois reserves the right to make any necessary amendments to the above timetable. Please check the Illinois Lottery website under the Business/Procurement Opportunities tab. Any changes will be posted on the Illinois Lottery website.<sup>1</sup> Vendors that submit Proposals will be notified in writing of any changes to these dates. Responses submitted late will not be considered.

### 2.2 Contacts

Please communicate any questions via email to [procurement-services@camelotillinois.com](mailto:procurement-services@camelotillinois.com). Questions regarding this RFP must be emailed before Wednesday, May 11, 2018 at 5:00 pm CT. A consolidated response to questions will be posted on the Illinois Lottery website under the [Business/Procurement Opportunities tab](#)<sup>1</sup> and will be made available to all Vendors without identifying the Vendor that asked the question. Camelot Illinois reserves the right to decline to answer specific questions.

### 2.3 Vendor Intends to Submit a Proposal

Vendors are required to notify Camelot Illinois that they intend to submit a Proposal via email to [procurement-services@camelotillinois.com](mailto:procurement-services@camelotillinois.com) by Friday, May 21, 2018 at 5:00 pm CT.

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<sup>1</sup> [http://www.illinoislottery.com/en-us/Business\\_Procurement\\_Opportunities.html](http://www.illinoislottery.com/en-us/Business_Procurement_Opportunities.html)

## 2.4 Response Format

Please provide the following information on the cover page of Vendor's Proposal and ensure that the Vendor's name appears on each subsequent page of the document:

- A. Vendor's Name;
- B. Vendor's Address;
- C. Contact Name;
- D. Contact Job Title;
- E. E-mail Address; and
- F. Telephone Number.

Ensure that Vendor's Proposal follows Camelot Illinois' format (e.g., numbering answers in the format of this document). Failure to do so may result in the Proposal being misinterpreted or missed. Please answer all questions fully. Proposals should be delivered in electronic format via email to [procurement-services@camelotillinois.com](mailto:procurement-services@camelotillinois.com).

The Proposal should explain how the Vendor could support Camelot Illinois in the achievement of its objectives.

Where possible, the Proposal should also include the following:

- A. Innovative ideas on meeting Camelot Illinois requirements;
- B. Why Camelot Illinois should choose you as a Vendor; and
- C. How your service offering differs from the competition.

## 3 Conditions of the RFP

### 3.1 General Considerations

The issuance of this RFP does not constitute a legal offer capable of acceptance.

Camelot Illinois reserves the right to reject any or all of the Proposals submitted or to withdraw the RFP at any time. Camelot Illinois also reserves the right to accept a Proposal from Vendors in part only.

Camelot Illinois will not be liable for any costs incurred by any company in connection with the preparation of a response to this RFP or for any costs incurred for attendance at meetings, presentations, clarifications, or demonstrations.

The numbering of this RFP is an important aid in the evaluation process. Please utilize it within the Proposal, as this may affect Camelot Illinois' evaluation of it.

Prospective Vendors may not take advantage of any apparent error or omission in this RFP. In the event that any errors or omissions are discovered, a Vendor shall notify Camelot Illinois immediately.

Please provide complete and accurate information against the specifications contained within this RFP. If Vendor is unable to meet any requirements, then this should be clearly noted in the appropriate response section(s). Any assumptions within the Proposal should be clearly stated.

Any commitment made in a Proposal shall be binding on the Vendor. A commitment includes any guarantee or representation made in the Proposal, accompanying documentation, or subsequent negotiation.

### 3.2 Confidentiality

Subject to Appendix A - Private Manager Agreement Incorporated Terms, of this RFP, any information disclosed in, or in connection with this RFP becomes the property of Camelot Illinois, subject to the Vendor's redaction of confidential, proprietary and other sensitive material in accordance with the PMA and State Policies and Rules. Such information will be available to the public in accordance with State Policies and Rules. The failure to designate any materials as "proprietary and confidential" at the time of delivery of such information to Camelot Illinois does not prohibit the Vendor from subsequently designating any information as proprietary and confidential. However, this designation does not necessarily exempt such information from disclosure under the Illinois Freedom of Information Act, 5 ILCS 140/1 et seq.

### 3.3 Employment

From the time this RFP is issued, until either (i) six (6) months after the award of a contract pursuant to this RFP or (ii) the rejection of all Proposals received by Camelot Illinois, Vendors are prohibited from officially or unofficially making any employment offer or proposing any business arrangement with Camelot Illinois employees.

## 3.4 Compliance

Failure to comply with any specific instructions detailed in this RFP may, at Camelot Illinois discretion, exclude the Vendor from further consideration in the process.

## 3.5 Selection of Vendor

Any response that fails to meet the requirements set out in this RFP will be disqualified. The table below defines the evaluation criteria and the relative importance of each criteria that will be used to evaluate the responses received. Requirements are identified in Section 7.

Response Elements	Relates to requirements	Maximum # of Points Possible
Company Information	C1-C8	25
Background & Experience	R1-R4	15
Writing & Analytic Samples	R5-R9	25
Account & Relationship Management	R-10	10
Support Staff	R-11	10
Research/Tech Capabilities	R-12	30
Overall price, pricing model and value for money	See 8.1	10
	Total	125

Camelot Illinois reserves the right to adjust selection criteria until May 18, 2018. Any such changes will be posted on the Illinois Lottery website in a timely manner to permit any necessary refinement of Proposals prior to submission.

Camelot Illinois decision on the winning bidders will be determined by the highest overall score(s) achieved based on the above criteria and, if appropriate, updated following any presentations. Camelot Illinois decision will be final.

## 3.6 Terms and Conditions

Vendors should note that any contract/purchase order award will also be subject to Camelot Illinois' terms and conditions.

Camelot Illinois operates within a regulated environment, and it is a requirement of the PMA that Vendors be vetted or approved by the state regulator in advance. Accordingly, the prospective Vendors must complete state disclosure and certification documents. For further information about this requirement, please contact, Procurement Services at [procurement-services@camelotillinois.com](mailto:procurement-services@camelotillinois.com).

The PMA requires Camelot Illinois to pass through various non-negotiable provisions to all Vendors. Camelot Illinois will achieve this by including a separate schedule entitled "Private Manager Agreement Incorporated Terms" into the Vendor's contract. This will take priority over any conflicting term in the rest of the contract. Refer to Appendix A of this RFP for the Private Manager Agreement Incorporated Terms.

From the time this RFP is issued until the end of the contract term, each Vendor represents and warrants that it shall neither be (i) debarred or prohibited from doing business with the State of Illinois for any reason; nor (ii) likely to have a material and/or adverse effect on the interests of the Lottery.

Camelot Illinois is looking to establish a contract with each Vendor for a term of three (3) years, subject to each Vendor's performance and Camelot Illinois evolving requirements and strategy. This will be subject to negotiations during the contracting stage.

## 3.7 Validity of Proposal

Proposals shall be binding offers, binding for a period of ninety (90) days from the date the Proposal is submitted.

## 4 Estimated Timings

### 4.1 Start of the Market Research Services

Our approach is to assess the Services to support our 2019-2021 marketing research plan. Projects will commence after selection of the Vendors and will be staggered over the course of the remainder of FY2019-FY2021. It is important to note that not all projects will commence at the same time, and different projects may be given to different Vendors based on the Vendor awarded the contract for that specific service.

The Vendors will be expected to accept individual project briefs from Camelot Illinois and carry them forth with the highest quality output.

## 5 Response Approach and Format

Vendors are requested to provide the following:

- A. A completed version of the Company Information section with brief responses;
- B. A completed version of the Requirements section with full responses against each requirement (where applicable); and
- C. A completed pricing schedule estimate with any variation included at the end.

Where necessary, Vendors may supplement responses with additional material but should ensure that material focuses on the information requested and references the section for which they apply. Camelot Illinois may be unable to search through generic material to attempt to find relevant information.

If the Vendor needs to exclude some requirements from its Proposal, this should be accompanied by a clear statement of which items are excluded and why.

If the Vendor wishes to propose additional services, not mentioned in the requirements, this should be provided in order to supply a full-service solution, please provide a clear statement of which additional items are included and why.



## 6 Company Information

Please provide the following information about the Vendor:

#	Background & Experience	Response
C-1	Vendor's name.	Answer in Full
C-2	Vendor's background, including details of ownership.	Answer in Full
C-3	Current number of employees.	Answer in Full
C-4	Annual turnover rate for each of the last 3 years.	Answer in Full
C-5	Current number of part-time employees.	Answer in Full
C-6	Please summarize Vendor's experience relevant to the requirements in the form of a general capabilities overview.	Answer in Full
C-7	Strengths and points of difference from Vendor's competitors.	Answer in Full
C-8	<p>Please describe the resources that will be allocated to support Camelot Illinois and Vendor's overall organizational structure.</p> <p>(If Vendor is selected to make a presentation, the people who would have day-to-day involvement with Camelot Illinois should make up a significant part of the presentation team).</p>	Answer in Full

## 7 Requirements

Please provide responses on the following general requirements:

For the Acknowledge Only requirements (R1-R7), Vendors shall Acknowledge the following requirements by either Accepting or Rejecting the requirement. If a Vendor Rejects a requirement, then any mitigating circumstances or alternative approaches may be offered, however these may not be accepted as compliant. For the remainder of the requirements, please provide a full response.

#	Background & Experience	Response
R-1	Vendor must be in business for at least one (1) year.	Acknowledge Only
R-2	Vendor must have expertise in both qualitative and quantitative methodologies.	Acknowledge Only
R-3	Vendor must have enough staff to be able to work on multiple Camelot Illinois projects simultaneously.	Acknowledge Only
R-4	Vendor must understand and accept without changes the Private Manager Agreement Incorporated Terms located in Appendix A.	Acknowledge Only

#	Writing & Analytic Samples	Response
R-5	Provide a masked writing sample from a recent qualitative study (e.g. key findings).	Answer in Full
R-6	Provide a masked work sample from a quantitative study, including the methodology and key findings pages.	Answer in Full
R-7	Demonstrate Millennial (generation group) research experience through a sample methodology overview from a previous study.	Answer in Full
R-8	Demonstrate convenience store research experience through a sample methodology overview from a previous study.	Answer in Full
R-9	Demonstrate your research experience with various ethnic groups through a sample methodology overview from a previous study.	Answer in Full
#	Account & Relationship Management	Response
R-10	Provide at least one (1) letter of recommendation from a current client that speaks to strong client management and relationship building.	Answer in Full
#	Support Staff	Response
R-11	Provide detailed profiles of the Vendor's employees who will be supporting the Camelot Illinois account and their level of experience/focal areas.	Answer in Full

#	Research/Technology capabilities	Response
R-12	Provide a capabilities overview that demonstrates that the Vendor can meet or exceed Camelot Illinois needs or objectives. Key areas to focus on include the following: concept testing/white space development, ad testing, marketing analytics, segmentation, 1:1 interviews, focus groups, shop-a-longs with eye tracking, game innovation, brand tracking, communications checks, data analytics, and syndicated data acquisition, shopper insights, multi-cultural insights, survey capabilities, eye tracking, virtual reality/augmented reality, technology trends in research, qualitative research capabilities, and online research capabilities.	Answer in Full

## 8 Price

### 8.1 Pricing

Please submit with your proposal a menu of pricing for these general areas (also described in Sec. 1):

- (concept testing/white space development
- ad testing
- marketing analytics
- segmentation
- 1:1 interviews
- focus groups
- shop-a-longs with eye tracking
- game innovation
- brand tracking
- communications checks
- data analytics
- syndicated data acquisition
- shopper insights
- multi-cultural insights
- survey capabilities
- eye tracking
- virtual reality/augmented reality
- technology trends in research; and
- online research capabilities

(collectively the “Services”).

We will assign projects on a per project basis based on our needs and at that time required specific quotes. All prices should be quoted in USD.

## 9. Business Enterprise Program (“BEP”)

Camelot Illinois is encouraging BEP (minority-owned, women-owned, disabled-owned businesses) to submit proposals for participation in this contract. Please visit the Illinois Department of Central Management Services website @ <https://www2.illinois.gov/cms/business/sell2/bep/Pages/Default.aspx> to learned more about this program and/or registered if you have not so already.

## Appendix A - Private Manager Agreement Incorporated Terms

See separate pdf file available on the Illinois Lottery website, reference - Private Manager Agreement Incorporated Terms.