



Request for Proposals for
Media Agency Planning and Buying Services

MARCH 25, 2019



1 Introduction

The Illinois Department of the Lottery (“Department” or “Illinois Lottery”) www.illinoislottery.com awarded the Private Management Agreement (“PMA”) to Camelot Illinois LLC (“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 is a leading technology and services provider that supports the Illinois Lottery. As part of an overall business strategy, it intends to assist the Department in growing revenue.

This Request for Proposals for Media Agency Planning and Buying Services (“RFP”) seeks a media agency or media agencies that will support channel initiatives, promoting the multiple ways to access and interact with lottery products and increasing sales to both Retail and iLottery properties. As such, the goal of this RFP is to enter into one or more contracts with media agencies (“Supplier”), who will provide Camelot services on an ongoing basis. Camelot will award Vendor(s) specific channel areas for contracting purposes under this RFP (one full-service Agency, i.e. an agency that buys across all channels, or a traditional agency for non-digital channels plus a digital-only media agency, and/or contracts with agency subcontractor partners as needed). The agency or agencies should bring innovative, strategic thinking to the business, leveraging tactics and channels aimed at increasing online and offline conversion (i.e. increase ticket sales at both retail and online properties across all product lines supported) for both new and existing players.

The Supplier(s) will provide the following media planning and buying services, (collectively, the “Services”):

- A. TV;
- B. Connected TV;
- C. Print;
- D. Static Out of Home/Billboard;
- E. Digital Out of Home;
- F. Radio;
- G. Streaming Radio;
- H. Digital Display;
- I. Search;
- J. Search Engine Optimization;
- K. Sports Marketing;
- L. Retail/Shopper Marketing;
- M. Multicultural Marketing; and
- N. Insights/Analysis/Media Investment Analysis;
- O. Other media planning and buying services (as requested by Camelot).



2 Instructions

This procurement is structured in two parts. All interested organizations are invited to complete Part 1 of this procurement by submitting a Company Information Survey response (“Part 1 Proposal” or Appendix B). From the organizations that participate in Part 1 (“Vendors”), Camelot Illinois shall invite a select number of organizations (“Finalists”) to participate in Part 2 of the procurement process. For the avoidance of doubt, any reference to Vendors in this RFP includes Finalists.

Finalists will be asked to participate in an interview/case study presentation and Live Assignment Meeting, and complete a Staffing and Compensation Proposal Template, attached as Appendix C (the Part 1 Proposal and Part 2 Proposal shall collectively be, the “Proposal”) and present against the Live Pitch Assignment, attached as Appendix D.

The requirements for both parts of the Proposal are set forth in Section 7 of this RFP.

Camelot is open to agencies of any size that can prove sufficient depth of staffing resources (minimum 20 employees in service office) to successfully manage their business. Illinois Lottery must be an important, but not the largest client in the agency’s client roster.

2.1 Timetable

Proposals should be submitted to the attention of: procurement-services@camelotillinois.com. See [Section 11 – Table of Appendices](#).

The RFP milestones (subject change by Camelot Illinois) are as follows:

| | |
|--|---------------------------|
| Issue RFP | March 25, 2019 |
| Last Date for Vendors’ Questions on Part 1 | March 29, 2019 by 5:00 pm |
| Answers to Vendors’ Part 1 Proposals (Appendix B) questions posted | April 8, 2019 by 5:00 pm |
| Vendor submits intent to submit a Proposal | April 9, 2019 by 5:00 pm |

Part 1

| | |
|----------------------------------|---------------------------|
| Part 1 Proposal (Appendix B) due | April 12, 2019 by 5:00 pm |
| Finalists contacted | May 3, 2019 by 5:00pm |

Part 2 (Finalists only)

| | |
|--|--------------------------|
| Last date for Finalists to submit questions on Part 2 Proposals (Appendices C-G) | May 7, 2019 by 5:00pm |
| Answers to Finalists’ Part 2 Proposals (Appendices C-G) questions posted | May 14, 2019 by 5:00pm |
| Case Study Input Template (Appendix G) | May 15, 2019 by 10:00 am |
| Finalist Interviews and Presentation of Case Study (conducted at Finalists’ Offices) | May 16-17, 2019 |
| Staffing and Compensation Template (Appendix C), Staff Biographies (open format) | May 22, 2019 by 5:00 pm |
| FY19 1H IL Lottery Media Pricing Exercise Template (Appendix E) due | May 28, 2019 by 5:00 pm |



| | |
|---|------------------------------|
| Live Assignment Meeting (Appendix D) (conducted at Camelot Illinois' office) | May 30-June 3, 2019 |
| Staffing and Compensation Template (Appendix C) negotiations | June 6, 2019 - June 14, 2019 |
| Estimated date of Award (subject to successful contract negotiations) | June 21, 2019 |
| • All times referred to above are in Central Time | |

Camelot Illinois reserves the right to make any necessary amendments to the above timetable. Any such changes will be posted on the Illinois Lottery website. Please periodically check the Illinois Lottery website under the [Business Opportunities](#) tab. Vendors will be notified in writing of any changes to these dates. Proposals submitted late will not be considered.

2.2 Contacts

Please submit any questions via email to procurement-services@camelotillinois.com. Questions regarding this RFP must be emailed by the due dates indicated below.

Questions related to Part 1 Proposals (Appendix B) are due by 5:00 pm CT on March 29, 2019.

Only Vendors selected as Finalists can submit questions related to Part 2 Proposals (Appendices C-G). Part 2 questions are due by 5:00 pm CT on May 7, 2019.

Responses to Part 1 and Part 2 questions will be posted on the Illinois Lottery website under the [Business Opportunities tab](#) and made available to 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 by 5:00 pm CT on April 9, 2019.

2.4 Vendor Interview and Live Assignment Meeting

All Finalists will be invited to participate in both an Interview/case study presentation and Live Assignment meeting. All interviewees will be asked the same set of pre-selected questions. Questions will be made available at the meeting. The interview will generally seek to understand the vendors experience with relationship management and conflict resolution, project management, previous work experience and media experience. The Finalists will also have time to present one case study relevant to the Illinois Lottery (Appendix G).

The Live Assignment (outlined in Appendices D, supplemented by Appendices E & F) is to be presented during the Live Assignment Meeting. The Live Assignment can be presented in any format but is limited to a maximum of 2 hours per finalist. Arrangements will be made for interviews and Live Assignment Meeting following selection of finalists.



2.5 Response Format

Please provide the following information on the cover page of the Part 1 Proposal (Appendix B) and, if applicable, the Part 2 Proposals (Appendices C, D, E, G) 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's format (e.g., numbering answers in the format of this document and using templates provided for response). Failure to do so may result in the Proposal being misinterpreted or missed. Please answer all questions fully. All Proposals should be delivered in electronic format via email to procurement-services@camelotillinois.com.

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

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 this RFP at any time. Camelot Illinois also reserves the right to accept a Proposal from Vendors in part only.

Camelot will not be liable for any costs incurred by any Vendor 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 made within the Proposal must be clearly stated.



Any commitment made in a Proposal shall be binding on the applicable 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 (“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 Incorporated Terms and State Policies and Rules (defined in the Incorporated Terms). 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 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 Proposal that materially fails to meet the requirements set forth in this RFP will be disqualified.

As outlined in Section 7 of this RFP, this procurement is structured in two parts. All Vendors will submit a Part 1 Proposal (Appendix B), and invited Finalists will submit a Part 2 Proposal (Appendices C-G).

Part 1 Proposal: All Vendors must demonstrate their qualifications by submitting a response to the “Company Information Survey,” or Appendix B. Please use the Appendix B Word document template when drafting Vendor’s Part 1 Proposal.

All Part 1 Proposals will be evaluated and scored in accordance with the table below. Camelot may invite up to five Vendors based on highest final scoring to proceed to Part 2 of the procurement.

Table 1 provides the Part 1 Proposal evaluation criteria and the maximum points that can be awarded for each criterion.



Table 1: Part 1 Proposal Scoring

| PART 1 PROPOSAL EVALUATION CRITERIA | SECTIONS OF THE COMPANY INFORMATION SURVEY THAT SUPPORT THE CRITERIA | MAXIMUM POINTS AWARDED |
|---|--|------------------------|
| Well established firm with existing depth of agency staffing resources to service the business | I, II, III, XII (if relevant) | 40 |
| Offers media service skill sets that fit Camelot Illinois' requirements | IV, X, XII (if relevant) | 60 |
| Has established media buying scale in required channels | II, III, IX, XII (if relevant) | 40 |
| Offers relevant client experience to benefit Camelot Illinois' business and has no known client conflicts | V, VI, VII, XII (if relevant) | 10 |
| Has a track record of excellence in the industry | III, XI, XII (if relevant) | 10 |
| Camelot Illinois' budget is a good fit with Vendor's current clients in top billing tier of current agency roster | VIII | 40 |
| | | |
| | Total | 200 |

Part 2 Proposal: All Finalists will be required to demonstrate their unique qualifications for final agency selection, based on the requirements set forth in Section 7 of this RFP.

All Finalists will be evaluated and scored on their performance against the following Evaluation Criteria and scored with up to a maximum of 400 points (i.e., based on Part 1 Proposal and Part 2 Proposal scores).

All Finalists should utilize the FY19 1H IL Lottery Media Pricing Exercise Template, attached as Appendix E and the 1H Foundational Overview, attached as Appendix F, to supplement their responses to the Live Assignment, attached as Appendix D.

Table 2 provides the Part 2 Proposal evaluation criteria and the relative importance each criterion will have in determining agency final selection(s).



Table 2: Part 2 Proposal Scoring

| PART 2 PROPOSAL FINAL AGENCY SELECTION EVALUATION CRITERIA | FORM OF EVALUATION | MAXIMUM POINTS AWARDED |
|---|--|------------------------------|
| Relationship management, conflict resolution, unique points of differentiation and prior work experience as evidenced through responses to interview questions. Superior core skill sets in required areas of digital/non-digital media services capabilities as evidenced through case study presentation. | Interview meeting – response to interview questions in meeting, responses to Appendix G, presentation. | 40 |
| Live Assignment: Demonstration of superior strategic insights, innovative tactical media plans, knowledge of Illinois Lottery’s business, and demonstrated media buying cost efficiencies. | Presentation of information in Live Assignment (Appendix D – Live Assignment; Appendix E – FY19 1H IL Lottery Media Pricing Exercise Template) | 80 |
| Quality/experience of the specific leadership and day-to-day team assigned to the business. | Staff Biographies (Open Format) | 20 |
| Competitive and fully transparent staffing and agency compensation proposal (labor-based fee retainer). | Staffing and Compensation Proposal Template (Appendix C) | 55 |
| Utilization of a BEP vendor | See Section 9 of this RFP | 5 |
| | | |
| PART 2 SCORE | | 200 |
| TOTAL: Part 1 and Part 2 Scores | MAXIMUM | 400 |

Camelot Illinois reserves the right to adjust selection criteria. Any such changes will be posted on the Illinois Lottery website no later than April 8, 2019 to permit any necessary refinement of Proposals prior to submission. Camelot Illinois will notify all Vendors or Finalists, as applicable, of all changes via email from sent from on procurement-services@camelotillinois.com.

Camelot Illinois’ decision on the Vendor(s) will be determined by the best offering of services, in addition to overall score(s) achieved based on the above criteria. Camelot Illinois reserves the right to award its business to either: Vendor to handle all Services or several Vendors, pending the outcome of this procurement. Camelot Illinois’ decision will be final.

3.6 Terms and Conditions

Vendors should note that any contract 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 Vendor must



complete State disclosure and certification documents located at <https://ipg.vendorreg.com/>. Only the Supplier(s) must register. For further information about this requirement, please contact Procurement at procurement-services@camelotillinois.com.

The PMA requires Camelot Illinois to pass through various non-negotiable provisions, specifically the Incorporated Terms, to all Suppliers. Camelot Illinois will achieve this by adding a separate exhibit with Incorporated Terms onto each Supplier's contract. The Incorporated Terms will take priority over any conflicting term in the rest of the contract. Refer to Appendix A of this RFP for a final version of the 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 a Supplier(s) for a term of three (3) years, subject to the Supplier's performance and Camelot Illinois' evolving requirements and strategy.

3.7 Validity of Proposal

Proposals shall be binding offers; binding for a period of one-hundred and twenty days (120) days from the date the Proposal is submitted.

4 Estimated Timing

Camelot Illinois intends to secure a Supplier or Suppliers that can begin providing Services starting in July 2019.

5 Response Approach and Format

To the extent applicable, Vendors are requested to provide the following:

- A. Part 1 Proposal - All Vendors
 - 1. Intent to submit a Proposal (via e-mail)
 - 2. Appendix B: Company Information Survey (via e-mail)

- B. Part 2 Proposal - Finalists only
 - 1. In-person Interview – The interview will be conducted at Finalist's office. Only Finalist staff who would be responsible for Camelot Illinois' account should attend the interview. The interview will consist of the following:
 - a. Pre-determined interview questions from Camelot Illinois. All Finalists will receive the same questions in the meeting; and
 - b. Finalist's presentation of one (1) relevant case study (Appendix G). Provide Camelot Illinois electronic copies of the presentation on two (2) separate thumb drives at the end of the interview.
 - 2. Appendix C: Finalist's Staffing and Compensation Proposal Template (Excel template) (via e-mail)



3. Appendices D, E and F: Finalist’s Presentation of Live Assignment and supplemental information.
4. Finalist’s Staff Biographies (open format) submitted (via e-mail) (Appendix C)
5. Live Assignment Meeting – Presentation of Live Assignment will be held at Camelot Illinois’ office. At such meeting, Finalists will present the assignment, provided in Appendix D and supplemented by Appendices E & F. Provide Camelot Illinois electronic copies of the presentation on two (2) separate thumb drives at the end of the meeting.

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

Vendors should make every attempt to limit responses to the information requested utilizing templates where provides. Camelot is unable to review unsolicited materials to find relevant information.

6 Company Information Survey

All Vendors responding to this RFP to demonstrate their qualifications for further consideration as a Finalist agency must complete the Company Information Survey (Appendix B). Please use the template provided.

7 Requirements

| # | PART 1 PROPOSAL: ALL VENDORS RESPONDING TO RFP | Response |
|-----|--|------------------|
| R-1 | Agency must complete and submit the “Company Information Survey,” using the template provided as Appendix B. | Answer in Full |
| R-2 | Via the Company Information Survey (Appendix B) Vendor must understand and accept without changes the Private Management Agreement Incorporated Terms located in Appendix A. | Acknowledge Only |

| # | PART 2 PROPOSAL: FINALISTS ONLY | Response |
|-----|--|---|
| R-5 | Interview and case study (Appendix G) presentation conducted at Finalist’s office. | In-person interview with proposed staff; Live case study presentation |
| R-6 | Submit a document that provides Finalist’s proposed staff biographies. | Answer in Full |
| R-7 | Presentation of Live Assignment (Appendix D). | Live Assignment |
| R-8 | Staffing and Compensation Proposal Template (Labor-based Retainer and Staff Plan Proposal) (Appendix C). | Answer in Full |
| R-9 | Discuss proposed utilization of BEP vendor. | Answer in Full |



8 Price

8.1 Pricing

Detailed and transparent compensation and staffing proposals to support the below service requirements must be submitted by **Finalists only**, using the Staffing and Compensation Proposal Template provided as Appendix C. Finalists should provide a fully transparent labor-based fee retainer that is supported by a fully disclosed staffing plan that will deliver the Year 1 Services set forth in Table 3 against an anticipated media budget of \$20-25MM. All pricing should be quoted in USD.

Table 3: Year 1 Services

| SERVICE CAPABILITIES | IN- SCOPE | OUT-OF-SCOPE |
|---|--|--|
| Media Services Management | General market Multi-cultural | -- |
| Strategic and Tactical Media Planning/ Buying | <ul style="list-style-type: none"> Tactical plans/year supporting Illinois Lottery master brand and retail and online sales of various games. Anticipate: <ul style="list-style-type: none"> 5-7 larger initiatives (\$500K+ budget) 5-7 mid-smaller initiatives (\$200K+ budget) Online/Offline channels Currently Illinois DMA only Priority media channels (TV, Radio, Print, OOH, Digital, Mobile, Social) Programmatic Sponsorships/Sports Shopper Marketing Retail Media (Geofence/In-store) App tactics Integrations/added value Media tests Paid Search and SEO (currently handled by another resource) may/may not be awarded pending outcome of review | <ul style="list-style-type: none"> CIL handles social community management in-house Experiential Marketing handled by another agency |
| Insights Leadership | <ul style="list-style-type: none"> Funnel to improved engagement (Online/In-store) Collaboration with CIL Insights Team on Brand Tracking Study/other research insight generation and applications Competitive media landscape insights and applications Media investment trends/forecasting New media channels/platform recommendations Media test opportunities | |
| Transparent Performance Analytics | <ul style="list-style-type: none"> Dashboard media KPI performance tracking Media mix optimization Post campaign media performance analytics/reporting Test market performance Performance Reporting Cycles: Daily data transfer, weekly performance updates, monthly channel insights, quarterly business reviews, campaign post-mortems | <ul style="list-style-type: none"> CIL manages sales tracking analytics/reporting |
| Other | <ul style="list-style-type: none"> Digital creative trafficking Stewardship reporting Make-good management Budget tracking Transparent estimates/invoicing | <ul style="list-style-type: none"> Non-digital trafficking by creative agency |



9. Business Enterprise Program (“BEP”)

Non-BEP Vendors should include in their proposal how they plan to utilize BEP Vendor(s) to support a portion of the work contemplated under this RFP.

Camelot Illinois invites BEP Vendors (i.e., minority-owned, women-owned, and people with disabilities-owned businesses) to submit Proposals for participation in this procurement.

Please visit the Illinois Department of Central Management Services website at <https://www2.illinois.gov/cms/business/sell2/bep/Pages/Default.aspx> to learn more about this program and/or register as a BEP vendor, if you have not so already.

10. Private Manager Agreement Incorporated Terms

See separate pdf file available on the Illinois Lottery website (<https://www.illinoislottery.com/illinois-lottery/major-procurement-opportunities>) . Vendor should review these terms and be certain that they are willing to submit to the terms as written, as they are always included as an exhibit to Camelot contracts.

11. Table of Appendices

1. Appendix A – Private Manager Agreement Incorporated Terms;
2. Appendix B – Company Information Survey;
3. Appendix C – Staffing and Compensation Proposal Template;
4. Appendix D – Live Assignment;
5. Appendix E – FY19 1H IL Lottery Media Pricing Exercise Template;
6. Appendix F – 1H Foundational Overview; and
7. Appendix G – Case Study Input Template.