



HOOSIER LOTTERY
CREATIVE AGENCY OF RECORD

REQUEST FOR PROPOSAL

Date Posted:
September 1, 2023

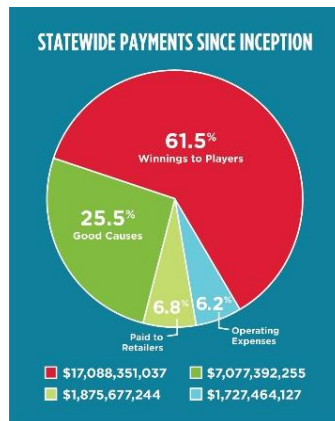
I. GENERAL INFORMATION

A. Purpose

The purpose of this Request for Proposal is to select a lead agency that can satisfy the Hoosier Lottery's need for a Creative Agency of Record. The selected firm will enter into negotiations with the Lottery's integrated services provider, IGT Indiana, LLC to develop a contractual relationship.

Under the supervision of the Lottery, the agency partner will be expected to:

1. Establish an integrated team environment in order to unify and enhance all strategic efforts around the Big Idea to deliver brand and sales growth.
2. Ability to deliver creative solutions at a high-volume pace, typically running multiple campaigns simultaneously, without losing sight of quality.
3. Define strategy through an understanding of our consumers, support channels, market conditions, and product information to propose and deliver well-defined, achievable, and easy to understand strategies.
4. Demonstrate marketing, retail, digital and lottery industry knowledge with a constant focus on future trends and best practices.
5. Analyze problems, identify solutions, and accept responsibility for its actions as well as lead change through clear and synchronized efforts and promote continuous improvement.
6. Establish the right mix of seniority, skill set and experience on the team.
7. Propose and deliver on well-defined, achievable, and easy to understand strategies that support the entire player journey.
8. Deliver creative strategy and execution that is high-quality and impacts the business positively and delivers against the Hoosier Lottery brand.
9. Work collaboratively with other agency, internal and external partners.



B. Expectations

As a trusted Hoosier brand founded with the mission to help build a Smarter, Safer Stronger Indiana, it is critical that the Hoosier Lottery's marketing partners uphold the principles of integrity, transparency, passion, inclusivity, and responsibility.

Since its inception on October 13, 1989, the Hoosier Lottery has paid more than \$17 billion in winnings to players and has contributed more than \$7.0 billion to good causes across the state, including local police & firefighters' pensions, the Teachers' Retirement Fund, and the Lottery Surplus Fund. More than \$1.8 billion has been paid to Lottery retailers.

C. Definitions and Abbreviations

Capitalized terms and abbreviations used in the RFP shall have the meanings ascribed to them in Schedule 1. Other special terms and abbreviations may be used in the RFP, but they are defined where they appear rather than in Schedule 1.

II. BIDDING AND CONTRACT ADMINISTRATION

A. Contract & Contract Term

The Lottery expects the Creative Agency of Record to start on or about February 1, 2024. Subject to the approval of the Lottery Commission, this contract is anticipated to run for an Initial Term through February 1, 2027, with two consecutive one (1) year optional Renewal Terms. The partner should understand that the contract will be with IGT, however, many terms related to the Integrated Services Agreement (ISA) between the State Lottery Commission and IGT, will be found within the contract. The ISA can be found at: [Bids | Hoosier Lottery | Hoosier Lottery](#).

B. Bidding Submission and Contract Timeline

September 1, 2023	RFP document posted
September 15, 2023 Noon ET	Questions due from Bidders
September 29, 2023 Noon ET	Credential and Case Study Proposals due from Bidders
By October 16, 2023	Finalists contacted
Week of October 23, 2023	Finalists' assignment briefing
Week of December 11, 2023	Finalists' presentations and cost proposal
Week of December 18, 2023	Apparent Successful Bidder(s) named

C. Bidding Contacts

Bidders may submit questions of clarification concerning the RFP before September 15, 2023 at Noon ET. Questions may be emailed to jmccleland@hoosierlottery.com with "CREATIVE AGENCY OF RECORD RFP Questions" in the subject line. Bidders are advised that the questions and responses by the Lottery may be shared with all interested bidders at the time to ensure all parties have equal access to the same information.

Credential packets must arrive at the following address by 12 Noon ET on Friday, September 29, 2023:

Jayne McCleland
IGT Indiana, LLC
1302 N. Meridian St.
Indianapolis, Indiana 46202

D. Letters of Clarification

During the assessment and scoring process the Evaluation Committee may have questions of clarification concerning specific elements of each submission. Bidders are requested to submit responses to these questions within 24 – 48 hours. Depending on the nature of the inquiry the information may be shared with other bidders and will be incorporated into the final Subcontract with the Subcontractor if relevant.

III. SCOPE OF WORK

The contract term for the successful bidder will begin on or approximately February 1, 2024 through February 1, 2027. The following scope of work is a *sample* Scope of Work that the Lottery's Creative Agency of Record would be responsible for executing during a given fiscal year. More specific information will be provided to selected bidder.

Account Management

- Manage and support creative process and communication channels for simultaneous campaign efforts at one time:
 - Develop and contribute to campaign and project-based timelines, finalizing elements in accordance with approved specified deadlines.
 - Create and/or contribute to presentation development for meetings, including presentation of creative strategy and support.
- Facilitate ongoing client-agency and agency-agency discussions:
 - Collaborate in bi-weekly all-partner status meetings and update of joint status reports.
 - Participate in campaign and project meetings.
 - Participate in department-specific status meetings.
 - Facilitate day-to-day contact with all third-party partners, including agency partners, to manage needs.
 - Develop and participate in quarterly presentations with agency and client leadership to review, reflect and build on partnership.
 - Manage all-agency campaign recaps, providing insights to impact future campaigns.
 - Expectation for onsite presence according to business needs.

Billing and Procurement Management

- Provide client with monthly budget summary spreadsheet and fee invoice no later than the fourth business day of the following month.
- Provide hours utilization reports (overall and by campaign) during the quarterly presentation with agency and client leadership.
- Contribute to all-agency MBE/WBE reporting quarterly. To be sent to client no later than 15 of July, October, January, and April.
- Agency vendor payment to be received no later than date provided on invoice.

Strategy

- Provide brand stewardship, ensuring all efforts align with brand strategies, architecture, and marketing code of conduct. Agency should verify legal clearances and adherence to legal guidelines prior to sharing creative strategies.
- Responsible for strategic leadership and partnership across Communications

workstreams and channels to support and deliver against business KPIs (Key Performance Indicators)

- Lead channel messaging strategy and communication tools and development across cross-functional marketing teams to demonstrate player's path-to-purchase.
- Support and amplify Sponsorship/Events initiatives, as needed.
- Channels include point of sale, out of home, broadcast, radio, print, website, app, organic and paid social, CRM (email, in-app, push, etc.), and paid media fulfillment.
- Attend a minimum of two lottery industry conferences per year to stay on the forefront of lottery industry trends and insights (e.g., NASPL or La Fleur's).
- Annual participation and contribution of the development of Business Planning, including road mapping, trends/insights presentation, strategic and copy support.
- Leverage research, reports, and promotional insights to ensure/improve the health of the Hoosier Lottery brand.
 - Includes utilization of segmentation insights to drive strategic decision-making across channels.
 - Includes utilization of Player Panel and myLOTTERY databases to gain timely learnings, and integration of findings and Quarterly Brand Tracker information to inform strategies.
 - Manage campaign measurement strategies, analysis, and reporting, sharing insights that can be applied to future efforts across channels for ongoing creative optimizations.
 - Management and development of analytics dashboard (i.e., Tableau or Google Data Studio) including paid and owned channels.
 - Support development of research activities to address knowledge gaps and better understand the player, product, or environment, including providing analysis, as requested.
 - Provide ongoing recommendations based on emerging and evolving trends both within lottery/gaming industry and across other industries. Present findings bi-annually as part of business planning process and holiday campaign planning.
 - Support annual approach to Key Account promotions to enhance future offerings and maintain strong retail partnerships.
 - Idea generation to leverage retailer loyalty programs and Omni Channel planning to strengthen Marketing partnerships.
 - Expectation that agency conducts quarterly retail visits at Key Accounts throughout Indiana to understand market conditions, providing client with recap notes.
- Recommend, develop, and submit award entries on behalf of client, once reviewed and submission clearances are obtained.

Mass Media & Focused Campaign Creation

- Lead creative for up to ten (10) product campaigns, five (5) Corporate Social Responsibility campaigns and up to eight (8) Omni-channel retail promotional campaigns. This includes managing up to five (5) different campaign creative

simultaneously.

- Development of a creative brief (building from project brief provided by Hoosier Lottery team), channel and communication strategy/communications plan needed to guide creative development.
- Creative concepting from Big Idea stage to final execution of the following deliverables, finalized through communication planning efforts:
 - *Traditional Efforts, including paid advertising and retail support*
 - Up to two (2) :30 TV/Video spots with potential for up to two (2) :15 versions (for Spot TV, Cable, OTT (Over the top), connected TV, Online Video - YouTube), GSTV).
 - Up to two (2) :30 radio spot(s) and up to three (3) :15 and :10 versions.
 - Support Out Of Home, including vinyl and digital billboards, retail pump toppers and icebox wraps.
 - Up to five (5) Statewide POS assets delivered as production-ready files (e.g. Play Center Footer, Change Mat, ITVM Topper, Tower Topper, Dispenser Bridge Topper etc).
 - Up to five (5) Statewide Shopper Marketing assets delivered as production-ready files, e.g. Standee, Drink Bar Mat, Floor Talker, Cooler Cling, etc.
 - Up to one (1) Key Account promotion POS piece delivered as a production-ready file.
 - *Digital Media Assets*
 - Up to two (2) primary digital banner designs.
 - Rich media ad unit designs as required by approved media plan.
 - Any needed static TV affiliate banners.
 - Social Media Assets delivered in all sizes/formats to fulfill the approved paid media plan and approved Channel Communications Plan (CCP)/Content Plan.
 - Social platform cover photos and the necessary quantity/variety of Organic and Paid Social ads (static, video, carousel, etc.) needed to adequately fulfill the needs of the media plan and monthly social calendar (sized/customized appropriately per platform including feed and Stories).
 - Suggested scheduling and flighting for each social ad.
 - Marketing Automation Assets including in-app, mobile and in-browser push notifications, emails, email modules, content cards, etc.
 - Segment-driven messaging, including up to two (2) emails, three (3) in-app messages, two (2) push notifications, and one (1) newsfeed/content card per campaign.
 - As needed: additional support for associated myLOTTERY 2nd Chance, Digital Activations (online games) or Promotions including email, in-app messages, push notifications and social media content.
 - *Website Assets*
 - Homepage headers, web parts, modals, content hub article etc. as indicated by the CCP/Content Plan

- Up to one (1) landing page design (UI (User Interface)) per campaign. Hoosier Lottery to build splash and sunset pages.
- *Live Event Marketing Events/Public Relations Awareness*
 - Creative input on extending Big Idea to live event marketing and public relations events, coordination and ideation with internal Lottery event marketing and PR team.
- *Key Account Support*
 - Support for up to three (3) digital graphics including app, web and social utilizing retailer provided specs. Hoosier Lottery internal graphic team will build out the rest based on these templates. The development process should align with pre-determined retail timelines.
 - Develop storyboard and animation for three (3) Circle K board buys. All sizes to be produced and trafficked, as needed, by media planning and buying agency. This will align with campaign work or a Circle K omni-channel.
 - Strategic and creative development for Key Account Omni Channel Shopper Marketing sell-in concepts for up to four (4) campaigns and on-going Cash POP™ support. Each campaign may include elements like:
 - Up to ten (10) concepts for loyalty integration, cross-product promotions, sweepstakes, Buy X get Y, BOGO, etc.
 - On-going promotions ideas for Cash POP to be included in product campaign deck.
 - Creation of up to ten (10) Omni Channel campaigns, a holistic marketing approach to supporting select Key Account efforts in and out of the retail environment. Support may include:
 - One (1) :30 or :15 radio spot
 - Up to six (6) OOH tactics such as pump toppers, GSTV, hose talkers.
 - Design and provide production ready files for up to six (6) in-store POS executions. Tactics may include a Change Mat, Standee, Floor Talker, Shelf Talker, Drink Bar Mat, Cooler Cling.
 - Winner awareness support for up to three (3) tactics.
 - Design and provide production ready files for up to six (6) digital executions. Tactics may include a social post and copy, mobile app graphics, website graphics.
- *Event / Sponsorship Support*
 - Provide strategic Big Idea recommendation and creative development for sponsorships and events for up to three (3) product campaigns annually including Holiday and February Scratch-offs, Cash POP, etc., and up to three (3) CSR campaign efforts, including Problem Gambling Awareness Month (March), Financial Literacy Month (April) and Beneficiary/Giveback (May).
 - Tactics will provide creative solutions to tie in Hoosier Lottery

sponsorships (i.e., digital geotargeting, product and CSR awareness and engagement ideas).

- For each of the three (3) product campaigns develop up to two (2) creative templates, resizing up to 20 digital assets to account for sponsorship partner needs (animated ribbon boards, digital ads, LED signage, etc.)
- Needs for CSR sponsorship inclusion listed within the section below. Deliver traditional and digital media assets monthly to each Hoosier Lottery partner. The Hoosier Lottery Sponsorship and Event Marketing team will populate a spreadsheet of needs in conjunction with each respective month and campaign briefing, and place on the Shared Drive.

myLOTTERY Membership Program

- **Analysis and Refresh of Ongoing myLOTTERY Acquisition Efforts**
 - Partner with agency media team to plan and execute an always on paid and owned strategy for myLOTTERY member acquisition and Hoosier Lottery App downloads.
 - Develop creative assets to fulfill the annualized campaign, leveraging findings from myLOTTERY survey results.
- **myLOTTERY Program Evolution**
 - Create monthly assets for promotion of the myLOTTERY program and mobile app. Highlight the variety of unique experiences from 2nd Chance, VIP trips, cash prizes, and more.
 - Always On myLOTTERY initiative – continue execution of “Hoosier All Year Long” campaign to engage/reward existing members, attract new myLOTTERY members, and underscore ongoing value of active myLOTTERY membership. Includes development of monthly assets (CRM and social) for the campaign. Work with media agency for paid social support.
- **Re-Engagement Campaigns**
 - Continue bi-annual re-engagement efforts with lapsed myLOTTERY members including use of coupons.
- **myLOTTERY Experiential Promotions**
 - Provide creative support for up to four (4) sponsorship partner promotions. Examples include Indianapolis Colts, Indiana Pacers, Indiana Fever, Indiana State Fair, etc.
 - Create the look and feel expressed as a website homepage hero and a static social post. Upon approval to the campaign theme, the Hoosier Lottery team will create all remaining assets, as needed.
 - Continued support and management of geo-targeted campaigns via app push notifications and in-app messaging.
- **Digital Activations (online games)**
 - Develop up to two (2) digital activations (online games designed and executed) to drive further engagement with players and attract new

myLOTTERY members through interactive web experiences / online games, possibly tied to 2nd Chance, in support of existing product campaigns to drive awareness and sales.

Other Brand-Related Activities

- **Social Media**
 - As covered under STRATEGY section, above: facilitate strategy discussions with Cactus and Hoosier Lottery team to develop social media paid placements. Provide insight-based trafficking instructions for media buying agency to build out and place paid social media campaigns.
 - Participate in monthly calendar discussion led by Social Media Specialist and coordinate with Cactus and Hoosier Lottery in trafficking of all social assets.
- **Content Strategy, Development and Support**
 - Provide guidance in the development of an annual CRM, website and social media editorial calendar including support in content creation of evergreen or campaign-related written pieces with accompanying images.
 - Provide content recommendations that support existing Business Plan initiatives such as myLOTTERY acquisition and retention, mobile app downloads, Positive Play, and Winner Awareness.
 - Management of content creator (influencer) campaigns. Develop influencer strategy, identify potential partners, vet for brand safety, coordinate SOWs and contracts with each creator.
- **Corporate Social Responsibility**
 - Beneficiary Appreciation - produce up to seventeen (17) Hoosier Story articles throughout the year for each of our three beneficiaries - teachers, police, and firefighters. This includes interviewing each beneficiary, writing articles, and creating social posts to promote each beneficiary's story.
 - Positive Play - develop up to sixteen (16) evergreen Positive Play assets to provide year-long CSR support in the form of a digital toolkit. This could include social media, email modules, in-app messages, push notifications and ESMM support.

Production Management

- Support all the creative workstreams detailed above with the required Production Management oversight needed to deliver high-quality, cost-effective, and brand-safe campaigns/assets including:
 - Gain production efficiencies by maximizing production development across campaigns.
 - Confirmation of all production specs and shipping information provided by vendors and Marketing partners.
 - Management of simultaneous campaigns and projects.
 - Management of talent usage agreements and payments.
 - Management of social media content creator (influencer) campaigns
 - Management of production timelines, ensuring they match up with overall

- campaign timing.
- Digital outdoor testing prior to delivery of production.
- Video production support, as needed.

IV. BACKGROUND

A. Corporate Structure

The Hoosier Lottery brand is supported by two corporate entities: The State Lottery Commission of Indiana and IGT Indiana. The Lottery Commission is a separate body corporate and politic of the State of Indiana and operates much like a standard state agency, with a board of Commissioners and an Executive Director appointed by the Governor of Indiana. IGT Indiana is a wholly owned subsidiary of global gaming giant Global Solutions Corporation and provides integrated services to the Lottery Commission under the ISA. The ISA has an initial term of 15 years but allows for performance-based extensions. IGT Indiana has already been able to obtain an initial 2 years of extension options. Each entity's responsibilities are set forth in the ISA and supporting documentation.

B. Hoosier Lottery Sales, Marketing and Product Portfolio

For Fiscal Year 2022 the Lottery had sales of \$1.703 billion with approximately 79 percent of sales from Scratch-offs and 21 percent from daily and Jackpot Draw Games. Lottery sales were supported with a statewide marketing budget of approximately \$18.5 million. In FY 2023, the lottery anticipates sales of \$1.7 billion.

C. Current Hoosier Lottery Distribution and Promotion

Hoosier Lottery Draw Games and Scratch-offs are offered statewide through a current retail network of approximately 4,460 outlets, comprised of 65.2 percent gas/convenience stores, 5.1 percent convenience stores only, 10.9 percent supermarkets and food stores, 10.8 percent liquor stores and the remaining 8.1 percent through various retail outlets such as newsstands and drug stores. 48.9 percent of Lottery retail outlets are chain-related, and 51.1 percent are independently owned and operated stores.

The Lottery provides all outlets with extensive retail display programs, including equipment (Lottery terminals, consumer-facing electronic display screens, ticket validation checkers, vending machines) as well as permanent and promotional display materials.

D. Hoosier Lottery Player Base

Continuing to deepen player relevancy and engagement with current players and expanding participation amongst lapsed players is essential to the Lottery's ongoing growth. Of the 5.2 million people in Indiana who are age 18 or older, 2.3 million are current players and 1.1 million are lapsed players. Of the lapsed players, 5% are unlikely to play again.

The Hoosier Lottery currently has sales of approximately \$4.50 per capita, per week.

Understanding regional variances is critical to deepening relevancy and increasing same store sales. Currently 50% of sales are sourced from the Northern Division,

which includes the North Central, Northeast and Northwest Districts. The Southern Division also accounts for 50% of the total state sales and includes South Central, Southeast and Southwest Districts.

Based on lottery player quantitative surveys, current player demographics are balanced in terms of gender (48.1% Male / 51.9% Female) with a mean age of 46. Lapsed players tend to be more female (59 percent) with a mean age of 50.

E. Corporate Social Responsibility

The Lottery's mission is to return maximum net income to the state in a socially responsible manner. We have woven Corporate Social Responsibility into every aspect of our organization's vision, policies and practice.

Thanks to our players, Hoosier Lottery funds have supported local police and firefighters' pensions, the Teachers' Retirement Fund and the Lottery Surplus Fund. The allocation of Lottery funds is controlled by statute, and since 1989, more than \$7B has been given back, benefiting every county throughout Indiana. The Lottery's Corporate Social Responsibility program focuses on three pillars: Responsible Gaming, Engagement and Responsible Practices.

F. Agency Partnerships

The Lottery currently has a partnership with Cactus for Media Buying & Planning. Cactus is responsible for planning and placing media across advertising, retail and digital.

The selected Bidder is expected to integrate across agency partners and the strategic Big Idea, providing creative solutions that align with media recommendations.

V. GENERAL REQUIREMENTS FOR BIDDERS

The Lottery is conducting a two-phase process to procure a Creative Agency of Record. Phase I will evaluate credentials and experience of Bidders. Qualified Bidders will be invited to Phase II of the procurement which will involve an assignment that will be judged by the Evaluation Committee as well as a cost proposal.

1. Phase I – Credentials and Case Studies

Phase I of the evaluation requires Bidders to supply credentials and case studies that articulate Bidders' experience and readiness to work with a fast-paced, retail business. Bidders must submit the following:

- A. **Transmittal Letter** - An individual authorized to legally bind the Bidder must sign the transmittal letter. The person who signs the transmittal letter will be considered the contact person for all matters pertaining to the offer unless the Bidder designates another person in writing. The letter must include the Bidder's mailing address, e-mail address, fax number and telephone number. Bidder shall submit a cover letter indicating that the Bidder is responding to the RFP and that all of the RFP requirements have been met. The Transmittal Letter should also confirm qualifications and interest in participating in this solicitation.
- B. **Agency Fact Sheet (ATTACHMENT A)** - Agency Fact Sheet, Attachment A, shall be completed by the Bidder.

- C. Three Case Histories** - Bidders must submit three video case histories showcasing the following relevant experience:
- 1) Integrated cross-functional marketing campaign leveraging channels from online to in-store and beyond. Demonstrate execution of campaign strategy and working relationship with media partners.
 - 2) Retail-driven case study that demonstrates ability to drive awareness and sales.
 - 3) Campaign that elicits an emotional response and breaks through the noise.

Each case study video should be no more than 4 minutes in length. Case histories must provide the following information:

- a. Business situation
- b. Business objectives
- c. Strategy and understanding of target audience
- d. How strategy was elevated across all utilized mediums
- e. Description of how agency worked with other partners, if applicable.
- f. Results – Sales results as well as other key performance indicators.

- 2. Phase II** – Bidders who meet the Lottery’s requirements will be invited to participate in the Phase II which will consist of the following:

- A.** Test Assignment - Bidders will be briefed on challenges that are facing the Lottery. After approximately six weeks, Bidders will be asked to present their strategy and tactics in an in-person meeting with the Evaluation Committee.
- B.** Based upon the Lottery’s scope of work, Bidders will be asked to submit a compensation proposal and staffing plan.

VI. EVALUATION OF PROPOSALS

A. Submission of Proposals

Bidder must submit documentation for Phase I in the following manner:

1. Main package must bear the Bidder’s name and contain a cover/transmittal letter from a member of the Bidder’s staff authorized to legally and contractually make the submission.
2. Package must contain seven (7) hard copies of the Agency Fact Sheet and seven (7) flash drives with video cases. Agency will be responsible for ensuring videos can be opened and viewed. Agencies may also provide links to videos within their proposals.

After Phase I submissions are evaluated, finalists will receive additional information on the format of Phase II submissions and presentations.

B. Evaluation Committee

The Lottery will appoint a committee to act as the proposal evaluation team (“Evaluation Committee”). The Evaluation Committee will be responsible for evaluating proposals’ compliance with the RFP, using the evaluation criteria stated in this RFP. The Evaluation Committee will be made of qualified subject matter experts to ensure that the best possible terms are arrived at for the Lottery.

C. Phase I Review and Scoring (Maximum Award: 100 Total Points)

The Evaluation Committee will review the Agency Fact Sheets and Case Studies from each bidder, evaluate and score the submission according to the maximum points allocated on the following criteria:

Categories	Points
Ability to perform scope of services. <ul style="list-style-type: none">• Relevance of clients• Appropriate size• Team experience• Services and Tools – marketing automation, etc.• Demonstrate how to incorporate Corporate Social Responsibility	35
Quality of Prior Work <ul style="list-style-type: none">• Case study 1• Case study 2• Case study 3	60
Indiana Office <ul style="list-style-type: none">• Current office and/or willingness to open an office in Indianapolis Minority-Owned/Women-Owned Business (MBE/WBE) <ul style="list-style-type: none">• Certified MBE/WBE• Plans to Utilize MBE/WBE subcontractors	5

Phase II Review and Scoring

Criteria and scoring procedures for the evaluation of Phase II presentations and submittals will be announced to finalists during the briefing.

D. Determination of Overall Score

Following completion of the scoring of Phase II, the Evaluation Committee will combine the Phase I, Phase II, and the pricing scores to arrive at a total score for each Bidder. The total scores will be ranked and the Bidder with the highest score will be named the Winning Bidder.

VII. NEWS RELEASES

Bidders shall not issue any written or oral statement or other written or oral communication to any press or other media representative with regard to the Lottery, the Lottery Commission, or this RFP, unless such communication is specifically approved in advance by the Lottery.

VIII. DISCLAIMER

By issuing this RFP the Lottery does not guarantee that a contract will be awarded. Furthermore, any Subcontractor must meet all requirements set forth in the Integrated Services Agreement between the Lottery Commission and IGT Indiana. A copy of the Integrated Services Agreement can be found at: <https://www.hoosierlottery.com/who-we->

are/bids.

IX. OWNERSHIP OF PROPOSALS AND CONFIDENTIALITY

Proposals and any other materials submitted by a Bidder in response to this RFP will become the exclusive property of the Lottery upon receipt and will not be returned. Materials submitted in response to this RFP will become public records under Indiana’s Access to Public Records Act (Indiana Code 5-14-3) (“APRA”) once received by Lottery staff. If materials contain trade secrets or other information that is confidential under APRA, **please label accordingly before submission to the Lottery.**

X. PROPOSAL COSTS

The Lottery is not liable for any costs incurred by Bidders as a result of responding to this RFP.

ATTACHMENT A – AGENCY FACT SHEET

Company: _____

Address: _____

Names and Titles of Principals: _____

Key Business Contact _____

Phone: _____ Email: _____

A. Agency History, Ownership and Key Employees

1. Founding Date. When was your office opened?
2. Address of Indiana office location, if applicable, and number of local employees.
3. Current Ownership. Who are the current owners of your agency?
4. Team leadership. Provide a short biography of no more than six team members that you propose manage the Hoosier Lottery account including the buyers responsible for Indiana markets. Describe their current roles and their past experience.
5. Parent Company/Affiliation. Provide a listing of all companies/agencies that are owned by or affiliated with your parent company.

B. Current Clients, Account Gains and Losses

1. Current Clients. List all current clients—brands, products and services—managed by your office. Rank them by size, indicate the services provided, the dates they were acquired and, if possible, approximate budget ranges for each.
2. Account Gains. Of the accounts acquired within the past two years, please comment on why your agency was chosen to service these new accounts.
3. Account Losses. Of the accounts lost in the past two years, explain why they left or were resigned by the agency.

C. Current Size

Current Size. Summarize the total Traditional Advertising and Digital Experience Services billings for calendar years 2021 and 2022, number of employees and number of accounts currently being handled directly by your office.

	2021	2022	2023 (to date)
Total Creative Billings Per Year			
Number of Employees			
Number of Accounts			

D. Scope and Nature of Agency Services

1. Agency Services. List the various services offered by your agency and the number of full-time employees dedicated to each department (e.g., account management, strategic services, buying)
2. Other Specialized Services. List any other specialized services your agency offers to its clients.

E. References

1. Client references. List four client references (name, title, company, address, telephone, email, and fax number) we might speak with about the effectiveness of your efforts.
2. Agency partners. List at least two references from agencies in which you have collaborated with in the past. Provide name, title, company, address, and email of a contact that can speak to your level of collaboration and integration.

Schedule 1 – Definitions and Abbreviations

“Bidder” means an entity that submits a Phase I response to the RFP.

“Lottery Commission” means the State Lottery Commission of Indiana created by Indiana Code 4-30.

“Draw Game” means a lottery game in which a player selects a combination of numbers or symbols, either manually or by an automated picking system, and winning tickets are determined by appropriately matching the combination of numbers or symbols randomly selected by the Lottery Commission at a designated future drawing or selection event.

“Hoosier Lottery” or “Lottery” means the operation of the state lottery in Indiana by the Lottery Commission together with its integrated services provider, IGT Indiana, LLC (“IGT Indiana”). References to “Hoosier Lottery” or “Lottery” may refer to the Lottery Commission, IGT Indiana, or both, depending on the situation.

“Initial Term” means the period starting upon effectiveness of an agreement between the Lottery and the Winning Bidder under the RFP, planned to be from February 1, 2024 to February 1, 2027.

“Scratch-off” means a preprinted ticket on which the game play data area is uncovered by removing a latex covering, to reveal immediately whether the player has won a prize.

“Jackpot Draw Game” means a Draw Game in which the prize amount will typically increase for a future drawing or selection events if no winner was selected.

“Marketing Code of Conduct” means a document which outlines and describes the requirements for Hoosier Lottery advertisements.

“Renewal Term” means an optional one (1) year period following the Initial Term during which an agreement between the Lottery and the Subcontractor is valid.

“RFP” means this Request for Proposal as issued by the Lottery.

“Subcontractor” means a person who provides or proposes to provide goods or services to the Lottery.

“Winning Bidder” means the Bidder who obtains the highest score through Phases I and II of the evaluation under this RFP.