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SECTION 1 – GENERAL INFORMATION

The Virgin Islands Lottery (VIL) was founded in 1937; its mandate was amended in 1971, within Title 32, Chapter 13 of the Virgin Islands Code. The Virgin Islands Lottery is an instrumentality of the Government of the Virgin Islands of the United States. The Virgin Islands Lottery is the oldest continuous traditional lottery in the United States. For the past 81 years the VI Lottery has been an integral part of the social fabric of the Virgin Islands community. It was established in 1937 and from its inception it has been a staple providing relief, employment, and for many a means of extra income for thousands of lucky players. VI Lottery agency is among the top revenue producers for the treasury of the territory. Annually, the VI Lottery contributes an average of \$1.5 million to the Public Schools, \$1 million to the GERS Retirees Bonus Program, 1.5 million to the Pharmaceutical Assistance Program, \$100,000.00 to the office of Veterans Affairs, and \$300,000 to non-profit organizations.

1.1 LOTTERY MISSION & VISION The Vision of the Virgin Islands Lottery is to be a cohesive, agile, multifunctional organization providing capabilities across a wide spectrum in the gaming industry of our territory (United States Virgin Islands), the Caribbean, and Latin America. To augment and support our territory Government (GERS, Veterans Affairs, Department of Education, Government Retirees, Pharmaceutical Assistance Program, Horse Racing Commission, and provide grants (to non-profit organizations) by which it may achieve stability in our community, and it will strengthen our team and family.

The Mission of the Virgin Islands Lottery is to execute the daily operations of the Virgin Islands Lottery with Integrity and professionalism

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1.2 RFP OVERVIEW

The VI Lottery, (hereinafter “VIL”) is inviting responses from qualified, consulting agencies to provide 5-7 Year Strategic Planning Services including account management, brand management, business development strategies, and technology platform services that will modernize the Traditional VI Lottery.

Qualified Respondents meeting the requirements and specifications contained in the RFP shall take into consideration all associated costs of providing the services requested in this RFP and offered in their Proposal. Any additional costs incurred by the Respondents will be the responsibility of the Respondent and not be the responsibility of the Lottery.

The successful Respondent(s) must ensure that they are fully capable of providing the services requested no later than December 30, 2018, the anticipated start-up date for the resulting Contract(s) October 1, 2018.

1.3 OBJECTIVES The VI Lottery is issuing this RFP in order to meet the following objectives:

- 1) Responsibly maximize net revenue from Traditional Lottery sales for the benefit of the Virgin Islands Government including the GERS, Veterans Affairs, Department of Education, Government Retirees, Pharmaceutical Assistance Program, and Horse Racing Commission.
- 2) Conduct a thorough lease versus purchase analysis to compare the value of owning commercial real estate opposed to leasing it. The analysis should take into account, but is not limited to the following: Up-front costs, Monthly recurring costs, Opportunity costs, Tax savings, Asset price appreciation, Increases in business equity, Money earned in the sale of property.

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3) Identify and plan implementation of technology that will improve security to maintain public trust. Organize access to information needed to make informed data-driven decisions and follow industry best practices to support modernization strategies for drawing operations, Web Sales Apps, and online lottery ticket sales.

1.4 PROJECTED TIMELINE

The anticipated timeline of events is as follows:

Publish RFP August 6, 2018

Proposals Submission Deadline (5:00 p.m. MST) August 24, 2018

Meetings with Finalists Sept. 10 – Sept. 14, 2018

1.5 ISSUING OFFICE This RFP is issued through the VI Lottery. The RFP Coordinator is the sole point of contact for this procurement. Any other communication that isn't directed to the RFP Coordinator will be considered unofficial and non-binding on the Lottery. The RFP Coordinator shall be solely responsible for clarification, amendment, modification or withdrawal of specifications, requirements, terms and conditions of the RFP.

1.6 RFP COORDINATOR The RFP Coordinator is: Victoria Burgess Confidential Executive Assistant, VI Lottery 5800 Kronprindsens Gade, St. Thomas, VI 00802. (340) 344-2756
rfpcordinator@vilottery.vi

1.7 LATE PROPOSALS Any Proposals received after 5:00 p.m. MT on August 24, 2018 will be automatically disqualified from further consideration.

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1.8 RFP CLARIFICATION QUESTIONS Questions relevant to the RFP must be submitted through email to the RFP Coordinator at rfpcoordinator@vilottery.vi. All inquiries should be written in generic terms and contain no pricing information. The Lottery will respond to questions as needed. Although every attempt will be made to respond to questions within that same day, the VI Lottery may have up to 3 business days to respond.

1.9 RESPONSIVE PROPOSAL SUBMISSION CRITERIA Each Respondent must submit one (1) Proposal only for the 5-7 Year Strategic Planning Services RFP. Please keep your response precise and to a minimum.

Proposals must be emailed to rfp@vilottery.vi

Failure to comply with or adequately respond to requested information in any section of the RFP may result in Proposal rejection. The Issuing Office will confirm receipt of all Proposals based on the e-mail provided on the enclosure.

SECTION 2 – RESPONDENT’S INFORMATION

2.1 CONTACT AND LEGAL DATA

a. State Respondent’s name, address, telephone, e-mail and website. Identify the key contact and disclose who within your firm will have the primary responsibility for the VI Lottery account.

b. Provide the names, addresses and telephone numbers of the principal officers as well as any owner that has more than 5% interest in your company. Please provide a brief biography, work experience summary and length of service for each principal (President, Chief Executive Officer, Vice-Presidents).

c. Specify the legal status of your firm (partnership, corporation) and the year your establishment was organized to do business as it now exists.

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- d. Describe your firm including size, areas of specialization, expertise and client base.
- e. State the location of the facility from which you would service the VI Lottery account.
- f. Provide the name and job title of any employee, principal officer or owner who is currently an VI employee, board member or has been employed by the VI Lottery within the past three years. If the VI Lottery determines that a conflict of interest exists, your firm may be disqualified from further consideration.

2.2 RESPONDENT'S QUALIFICATIONS

- a. Please provide a current description of your organization (i.e. organizational chart) by job title and indicate the number of fulltime employees in your firm.
- c. Describe your accounting system for tracking hours worked and expenses charged to your clients. Describe how you would monitor the VI Lottery account.
- d. List your firm's six largest accounts, their approximate billings and describe the work you do with each and how long you have been working with each one. This may be marked confidential.
- e. Please list any new accounts acquired within the last three years, including organization name, contact persons, phone numbers, e-mail addresses and billing size of account (billing size may be marked confidential). Provide a brief explanation on why you were chosen for these accounts.
- f. Please list any accounts lost within the last three years, including organization name, contact persons, phone numbers, e-mail addresses and billing size of account. Provide a brief explanation on why account was lost or resigned. If your firm has had a contract terminated for default please indicate as such. Termination for default shall be defined as notice to stop performance due to non-performance or sub-standard performance.

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g. List the names, addresses and telephone numbers of three business references for which work has been performed and describe the type of service provided. Provision of these references constitutes a grant of permission for the contact person identified in Section 1.6 to contact the named references.

2.3 ACCOUNT PERSONNEL

a. Provide a description of your proposed team for strategic planning services. Indicate whether they are employees or contractors. Please provide the following for each team member: • Name & Title • Biography • Educational Background • Work Experience • Significant accomplishments • Length of service with your firm

b. In addition, identify the responsibilities those team members would hold if working on the VI Lottery account and a list of the other accounts these members would be working on with percentage of time estimates provided for each account. If you make changes to the proposed account services team after responding to this RFP, immediately provide written notification of the changes to the VI Lottery RFP contact person listed in Section 1.6.

2.4 ROUTINE EXPENDITURES The successful Respondent must pay for all charges incidental to the routine conduct of business, including but not limited to:

• Postal charges • Overnight deliveries • Carrier/delivery charges • Telephone calls • Facsimile charges • Copying (color and black/white)

The successful Respondent shall pay for travel related expenses incurred by their staff.

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SECTION 3 – STRATEGIC PLANNING SERVICES

3.1 ACCOUNT MANAGEMENT Project management is critical to ensuring that our projects are implemented correctly and on time. While projects in themselves are unique, cost control, timeline development, resource procurement and risk management are standards for product development that stay the same. The successful Account Services Respondent must provide an account service team dedicated to the VI Lottery account. An account supervisor must head the account service team. The VI Lottery reserves the right to approve all personnel assigned to the account services team.

The account services team, Lottery marketing staff and possibly other advertising agencies and/or vendors will meet, on a regularly scheduled basis, to recap, plan and forecast marketing and advertising activities. The successful Account Services Respondent shall provide written reports of all activities, instructions and decisions made in those meetings.

Please describe what your strategy would be to manage all parties involved in the VI Lottery marketing and technology initiatives to ensure success in the execution of strategies. Include information regarding your philosophy on collaboration and how would you optimize your role to achieve the best synergy amongst all parties involved.

Each Respondent must provide a sample of an actual post client report itemizing activities, instructions and decisions made during a meeting.

3.2 STRATEGIC PLANNING The successful Account Services Respondent shall develop the best strategies and tactics to achieve specific objectives set forth by the VI Lottery. The Respondent should constantly examine and reevaluate with regard to current results and market conditions. In conjunction with the Lottery, the Respondent shall meet on a regular basis to discuss and strategize about future advertising needs, promotions, events and products.

The VI Lottery is looking for a strategic partner. Describe a marketing or advertising strategy that a member of your team thought of and “sold” to one of your clients to help their business build efficiency or effectiveness. Describe the result. The VI Lottery would like to augment its retailer base. Please describe creative ways the Lottery might be able to accomplish this using marketing/advertising.

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The VI Lottery would like to modernize its ticket and drawing operations, while still maintaining the traditional identity and branding. Please describe creative ways the Lottery might be able to accomplish this.

3.3 THE MARKETING AND ADVERTISING PLAN The successful Account Services Respondent, shall assist the VI Lottery marketing staff in developing and maintaining a continuous marketing plan. The plan will support the Lottery, its games and promotions.

The successful Respondent(s) shall prepare and deliver to the VI Lottery, on a mutually agreeable time schedule, all billings and invoices pertaining to advertising services provided. Each invoice must include an itemized accounting of the expenditure. On the face of all invoices, the successful Respondent(s) must identify the expenditure by name and account number. The successful Respondent(s) must maintain appropriate accounting records and shall be subject for audit or review.

SECTION 4 - PRICING Our Virgin Islands Lottery pricing is based on Virgin Islands Lottery Regular and Extraordinary drawing prospectus.

4.1 LETTER OF TRANSMITTAL AND PRICE PROPOSALS FORMAT The Price Proposal must include a submittal letter signed by an individual authorized to obligate the Vendor to the prices quoted. Those prices must be valid for at least 120 days from the Proposal submission date.

All prices are to be expressed in U.S. dollars. Vendors must submit their Price Proposal along with their entire Proposal package. The proposed pricing must include all required services as outlined in this RFP.

SECTION 5 – MEETINGS WITH FINALISTS

5.1 MEETING REQUESTS Respondents may be requested to meet with the evaluation committee and must be available for such meetings on dates set forth in Section 1.4. Meetings will be requested and held at the discretion of the VI Lottery and may be waived by the VI Lottery evaluation committee. A Respondent's refusal to honor a request for a meeting shall constitute a basis for elimination.

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5.2 MEETING SCHEDULE The VI Lottery will schedule a time for each meeting. Meetings are preliminarily planned to take place September 10 - 14, 2018. Meetings with Respondents will be a maximum of 2 hours. The meetings will be held at the Lottery. It is preferred that those persons, who would be assigned to work on the Lottery account, be present.

5.3 PURPOSE OF MEETINGS The evaluation committee will use the meetings for the following:

- 1) To further clarify written proposals.
- 2) Meet prospective account teams, creative personnel and/or owners and get a feel for company objectives and collaboration strategies.
- 3) To pose situational questions as it relates to this RFP.

The VI Lottery reserves the right to change format and content of the meetings based on content of written proposals.

SECTION 6 – PROPOSAL EVALUATION

6.1 INTRODUCTION The RFP Evaluation Team will evaluate all responsive Proposals. The goal of the Evaluation Team is to select the Proposal that offers the best value in terms of price, performance, services and creativity. The Evaluation Team will evaluate each Proposal that is properly submitted and will make a contract award recommendation to the Director.

Proposals that fail to provide specific information to adequately describe a Respondent's proposal for the marketing/advertising services requested in this RFP may be deemed non-responsive and may be rejected.

Respondents must be as specific as possible in describing the details of their Proposals. Respondents are forewarned that a Proposal that meets requirements with the lowest price might not be selected if, in the Lottery's judgment, a higher-priced Proposal offers greater overall value to the Lottery. The closer Proposals are in general merit, the more important price becomes a factor in the final contract award decision(s).

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6.2 EVALUATION COMMITTEE The Lottery will conduct a comprehensive and impartial evaluation of all responsive bids. That evaluation will be conducted by an Evaluation Team of qualified personnel selected by the Lottery. The Team will evaluate each Proposal that is properly submitted and will make recommendations to the Director, who will review and make a recommendation to the Lottery Commission. The Lottery Commission will make the final decision regarding selection of the successful Respondent(s).

6.3 INFORMATION FROM OTHER SOURCES The Lottery and the Evaluation Committee reserve the right to obtain information concerning a Respondent, which the Lottery or the Evaluation Committee deems pertinent to the RFP, and to consider such information in the Proposal Evaluation.

6.4 EVALUATION STEPS The Proposal Evaluation process and Contract Award will consist of the following steps: • Phase 1: Proposal Submission Requirements Review • Phase 2: Proposal distribution to Evaluation Committee • Phase 3: Respondent's Proposal Evaluation - Phase 3/Step 1: Preliminary Review by Individual Team Members ☐ Phase 3/Step 2: Committee Review

Phase 3/Step 3: Written Proposal Evaluation - Phase 3/Step 4: Price Proposal Evaluation - Phase 3/Step 5: Notification of meeting request • Phase 4: Meetings with finalists • Phase 5: Final Decision on Contract(s) Award Recommendations • Phase 6: Approval of Lottery Director & Commission • Notification of Successful Respondent and Contract(s) Negotiation • Contract(s) Award

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6.5 SCORING OF PROPOSALS Each responsive Proposal will be evaluated and scored based upon the Respondent's ability to provide the services described in this RFP. Below is an outline of the point values assigned to each area of your proposal.

Strategic Planning Services Scoring:

<i>Written Proposal</i>	<i>50 points</i>
<i>Price Proposal</i>	<i>25 points</i>
<i>Meetings with Lottery</i>	<i>25 points</i>
Total	100 points

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RESPONDENT'S CERTIFICATION

I certify that I have the authority to bind the Respondent indicated below to the specific terms and conditions imposed in the RFP and offered in the Respondent's proposal. By my signature on this document, the Respondent specifically agrees to all of the waivers, restrictions, and requirements of the RFP as conditions precedent to submitting this proposal. I also certify that the Respondent has not knowingly made false statements in its response to this RFP or consulted with others for the purpose of restricting the competitive solicitation process.

RESPONDENT _____

CONTACT _____

TITLE _____

SIGNATURE _____

DATE _____

I have read, and agree to the terms and conditions of this RFP and the General Contract Terms for the resulting Contract.

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