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TEXAS LOTTERY COMMISSION

Gary Grief, *Executive Director*

Alfonso D. Royal III, *Charitable Bingo Operations Director*

January 18, 2018

Salma Gottfried
Richards/Lerma
7007 Twin Hills Avenue, Suite 300
Dallas, TX 75231

Via email: sgottfried@richardslerma.com
TIME SENSITIVE

RE: Request for Proposals (RFP) for Advertising Services, RFP No. 362-18-0002

Dear Ms. Gottfried:

The Texas Lottery Commission (TLC) requests clarification of the proposal submitted by Richards/Lerma as more specifically set forth below.

1. Please briefly describe the responsibilities of Richards/Lerma, RO2 and GDC for media planning and buying.
2. Are the following individuals currently employed by Richards/Lerma?
 - Tommy Thompson
 - Linda Flores
 - Danny Valderrama
 - Jill Natowitz
3. Please provide a cross index of the proposed staff listed in response to Section 6.2 using the titles and descriptions listed in the RFP for this Section.
4. Resumes were provided for some staff that are not listed on the organization/structure charts, for example Norberto Zylberberg, Sharon Chortek, etc. Please provide updated charts that show where these positions fit within the structure.

Please provide your written response to me no later than **4 p.m. CST on Monday, January 22**. Your response may be submitted via e-mail to angela.zgarba@lottery.state.tx.us. In accordance with Section 1.7 of the RFP, please mark any information considered confidential as such. Thank you for your immediate attention to this matter.

Sincerely,

A handwritten signature in cursive script that reads "Angela Zgarba-Zgarba".

Angela Zgarba-Zgarba, CTPM, CTCM
Contracts Management & Procurement Manager

P.O. Box 16630 • Austin, Texas 78761-6630

Phone (512) 344-5000 • FAX (512) 478-3682 • Bingo FAX (512) 344-5142

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January 22, 2017

Ms. Angela Zgabay-Zgarba
Contracts Administrator
Texas Lottery Commission
611 East 6th Street
Austin, TX 78701

RE: RFP QUESTIONS

Dear Ms. Zgabay-Zgarba:

Thank you for the opportunity to submit our answers for clarification as they relate to the Request for Proposal for Advertising Services No. 362-18-0002.

Pursuant to the Texas Lottery Commission's (TLC) request for clarification of the proposal submitted by Richards/Lerma, we are providing the answers to the questions set forth below:

1. Please briefly describe the responsibilities of Richards/Lerma, Ro2 and GDC for Media planning and buying.

Richards/Lerma has assembled a media team that together will bring the media plan and execution to life in a seamless manner. Richards/Lerma will ensure the optimization, reporting, budget tracking, and back-end processes are aligned across agencies. The integration of Richards/Lerma, Ro2 Media and GDC allows for:

- The three teams working together on the campaign ideation to ensure that the media efforts are aligned with the overall campaign strategy.
- Ro2 to develop the media strategies and tactics of the plan, including the analysis of the markets, target opportunities, media vehicles, media goals and KPIs, and provide detailed planning numbers.
- Ro2 Media to work with GDC during the planning process for additional local market insights and conditions, as well as planning rates.
- GDC to negotiate and place the buy for off-line media, including broadcast, outdoor, and print, once the plan is finalized and approved. GDC will also provide the buying reports and post-buy analysis and will be responsible for the media billing back-end process. Ro2 Media and GDC to combine their capabilities to place digital media, continually monitoring and optimizing the campaign, and generate all the digital reports.

2. Are the following individuals currently employed by Richards/Lerma?

Richards/Lerma prides itself on the talent of the individuals we bring to our agency. We constantly establish relationships and search the industry to find the most talented individuals to join our team and help drive our client's business. There are times when we

identify candidates, but do not have the clients in-house to be able to hire them. In those cases, we look for opportunities where we can bring these candidates onboard as agency team members.

The individuals mentioned below are not currently on the Richards/Lerma payroll. However, they are not new to our agency:

- **Tommy Thompson** (Account Director). Our relationship with Tommy goes back 20 years when he and Pete Lerma first worked together at another agency. Since that time, the relationship has evolved both professionally and personally. We have always kept a close eye on Tommy and the successful agency he founded servicing clients such as McDonald's, Sprint, The Coca-Cola Company, and Nestlé USA, among others. Tommy was an integral part of the team that prepared and submitted the Texas Lottery RFP and also worked closely with the agency team from the very beginning of the RFP process. Richards/Lerma has executed an employment agreement with him contingent on the agency being awarded the Texas Lottery business.
- **Linda Flores** (Account Coordinator). The agency has been in conversations with Linda since we were first exposed to her work at Education is Freedom. Richards/Lerma executed an employment agreement with Linda contingent on the agency being awarded the Texas Lottery business.
- **Danny Valderrama** (Billing Coordinator). Our relationship with Danny goes back many years as a subcontractor to Richards/Lerma. Danny has recently informed us that he has taken a full-time position elsewhere following some changes in his personal life. As such, this position has been updated in the attached staffing plans as a TBD. We have 2 strong candidates currently in the interviewing process.
- **Jill Natowitz** (Proofer/Translator). Our relationship with Jill goes back over 2 years as a subcontractor. She is not a current Richards/Lerma employee, nor is the goal for her to be one. Her name and resume were submitted under team members since she would work on the account on a regular basis. Jill is a subcontractor and is listed in the HSP plan under HSP Item Number 9 Translation Services, All languages, as required per the RFP in Section 5.4.2.

Please note that since the submission of the RFP on December 5, 2017, Yanmile Mahomed, who was listed as one of the two Account Supervisors under Account Management, is no longer an employee of Richards/Lerma. We are actively recruiting for this position and are confident we will be able to fill the position with a strong candidate before we start working on the business.

3. Please provide a cross index of the proposed staff listed in response to Section 6.2 using the titles and descriptions listed in the RFP for this Section.

As requested, we have provided an updated response following your format and titles for the disciplines listed under Section 6.2.

4. Resumes were provided for some staff not listed on the organization/structure charts, for example, Norberto Zylberberg, Sharon Chortek, etc.

In our effort to cover everyone in our combined agency team who would work on your business, there were some positions that did not necessarily fit your description but we felt it was important to include them. These are individuals whose titles did not fit under Section 6.2, but who would still be involved in the business and be absorbed as overhead, or as subcontractors for production like Norberto and Sharon. As requested, we have included updated charts that exactly match your titles and descriptions. We are also adding one organizational chart titled Team Ecosystem that gives you a broad overview of everyone who will play a key role in your business.

Please let me know if you have any questions or require additional information.

Yours truly,



Salma Gottfried
Principal/Brand Management Director

AGENCY TEAM ECOSYSTEM

**CREATIVE
7 POSITIONS**

Aldo Quevedo
Principal/Creative (OHST)

Flor Leibaschoff
Creative Director (6.2.6)

Luis Enriquez
ACD/ Art Director (6.2.6)

Ruth Lovati
Art Director (6.2.6)

Samuel Melgar
Copywriter (6.2.6)

Madeleine Glenski
Copywriter (6.2.6)

TBD
Copywriter (6.2.6)

**STRATEGIC PLANNING
3 POSITIONS**

Quim Gil
Principal/Planning (OHST)

Carlos Rodriguez
Account Planner (6.2.4)

Sara Michael
Account Planner (6.2.4)

**Ro2 MEDIA
5 POSITIONS**

Rodrigo Vallejo
Media Director (6.2.5)

Kathy Alexander
Media Supervisor (6.2.5)

Jessica Arvelo
Media Planner (6.2.5)

Juanita Fierro
Junior Media Planner (6.2.5)

Karla Gonzalez
Junior Media Planner (6.2.5)

**SOCIALISSIMA
SUBCONTRACTOR (2 POSITIONS)**

Norberto Zylberg
Founder/Creative Director (KS)

Sharon Chortek
Production Services (KS)

**ACCOUNT MANAGEMENT
9 POSITIONS**

Pete Lerma
Principal/Founder (OHST)

Salma Gottfried
Principal/Brand Management (OHST)

Tommy Thompson
Account Director (6.2.3)

Derek Diaz de Leon
Account Supervisor (6.2.3)

TBD
Account Supervisor (6.2.3)

Paola Aguayo
Account Executive (6.2.3)

Cindy Villalta
Account Executive (6.2.3, 6.2.7)

Alvaro Polanco
Jr. Account Executive (6.2.3, 6.2.8)

Linda Flores
Account Coordinator (6.2.3, 6.2.7)



**DIGITAL/SOCIAL
2 POSITIONS**

Francisco Cardenas
Digital Strategy Director (OHST)

Ovidio Hinojosa
Programming Specialist (6.2.7)

OHST: Overhead Support Team
KS: Key Subcontractor

**OPERATIONS/FINANCE
8 POSITIONS**

Melissa Sinkoski
Principal/Director of Finance and Operations (OHST)

Celeste Ponce
Finance Manager (6.2.9)

TBD
Billing Coordinator (6.2.9)

Matias Sada
Production Manager (6.2.7)

Paolo Linares
Producer (6.2.7)

Cesar Jasso
Producer (6.2.7)

Jill Natowitz
Proofreader/Translator (6.2.7)

TBD
Print Producer (6.2.7)

**GDC MEDIA/EXPERIENTIAL
SUBCONTRACTOR (10 POSITIONS)**

Beth Wammack
Partner/Chief Operations Officer (OHST)

Carey Quackenbush
Partner/Chief Ideation Officer (OHST)

Christian Munoz
Experiential Manager (6.2.8)

Lisa Gomez
Media Supervisor (6.2.5)

Lannette Espino
Media Buyer (6.2.5)

Gabriela McClain
Jr. Media Buyer (6.2.5)

Whitney Uribe
Jr. Media Buyer (6.2.5)

Tom Lewis
Finance Manager (6.2.9)

Linda Countryman
Staff Accountant (6.2.9)

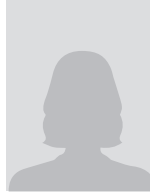
Selina Smith
Billing Coordinator (6.2.9)

6.2.3 ACCOUNT SERVICE STAFFING



Tommy Thompson
Account Director

Derek Diaz de Leon
Account Supervisor



TBD
Account Supervisor

Paola Aguayo
Account Executive



Cindy Villalta
Account Executive

Alvaro Polanco Jr.
Account Executive



Linda Flores
Account Coordinator

6.2.4 ACCOUNT PLANNING



Carlos Rodriguez
Account Planner



Sara Michael
Account Planner

6.2.5 MEDIA STAFFING



Rodrigo Vallejo
Media Director



Kathy Alexander
Media Supervisor



Jessica Arvelo
Media Planner



Juanita Fierro
Jr. Media Planner



Karla Gonzalez
Jr. Media Planner



Lisa Gomez
Media Supervisor



Gabriela McClain
Jr. Media Buyer



Lannette Espino
Media Buyer



Whitney Uribe
Jr. Media Buyer

6.2.6 CREATIVE STAFFING



Flor Leibaschoff
Creative Director



Luis Enriquez
ACD/Art Director



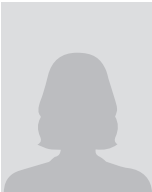
Ruth Lovati
Art Director



Samuel Melgar
Copywriter



Madeleine Glenski
Copywriter



TBD
Copywriter

6.2.7 PRODUCTION STAFFING



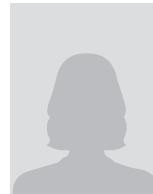
Matias Sada
Production Manager



Cesar Jasso
Producer



Paolo Linares
Producer



TBD
Print Producer



Jill Natowitz
Proofer/Translator



Ovidio Hinojosa
Programming Specialist



Cindy Villalta
Account Executive
(Project Manager Role)



Linda Flores
Account Coordinator
(Traffic Manager Role)

6.2.8 EXPERIENTIAL EVENT STAFFING

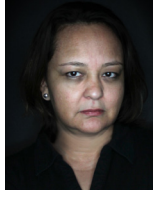


Christian Munoz
Experiential Manager



Alvaro Polanco
Jr. Account Executive
(Experiential Coordinator Role)

6.2.9 FINANCE STAFFING



Celeste Ponce
Finance Manager



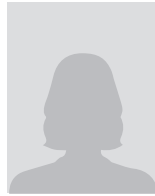
Tom Lewis
Finance Manager



Linda Countryman
Staff Accountant



Selina Smith
Billing Coordinator



TBD
Billing Coordinator

6.2 AGENCY STAFF STRUCTURE

6.2.1 Proposers must submit an in-depth staffing plan, by department, for the Texas Lottery account. However, the Texas Lottery is not predisposed to any particular staffing model. Proposers are encouraged to propose staffing plans that offer the best value to the Texas Lottery, both in terms of account service and adequate staffing. If a different individual will not be assigned to each position, the Proposer must explain how service levels will be maintained and staffing needs met. This section identifies the staffing positions that have been previously used for the Texas Lottery account.

Richards/Lerma will be the lead agency across all of the disciplines required in the request for proposal:

- Account Management
- Strategic Planning
- Creative
- Production
- Digital and Social Media Strategy
- Experiential Management
- Billing
- Translations

We have identified four disciplines we will subcontract to other parties. The Subcontractors are partners we have worked with for less than 5 years, and who have passed an in-depth vetting process. These partners will be held to the same high standards we hold ourselves to, and we are confident they will deliver excellent work and meet every expectation.

- Media Planning – Ro2 Media
- Media Buying – GDC Marketing & Ideation
- Experiential Execution – GDC Marketing & Ideation
- Social Content – Socialissima

6.2.2 Proposers must provide a list of personnel to be assigned to the Texas Lottery account and include resumes for all personnel, including name, title and job description. Lists and resumes provided by Proposers must include, at a minimum, information regarding length of time spent doing present duties or related duties; a description of duties; projects accomplished, including scope and name of customer's company; and relevant continuing professional education. If duties were performed for an employer other than the Proposer, the Proposal must indicate that employer's name.

We have read, understand, and will comply with section 6.2.2.

6.2.3 Account Service Staffing. Proposers shall identify the key personnel who will provide direction or oversight to the Texas Lottery account, at a minimum, to include an Account Director. The Proposer must demonstrate that these individuals have the background and experience required to coordinate the Proposer's activities for the Texas Lottery account, including special projects and activities. The Account Director should have a minimum of five (5) years account service experience, the Account Supervisor should have a minimum of three (3) years account service experience, and Account Executives should have a minimum of one (1) year of experience. Account Service staff may include the following:

- Account Director – Tommy Thompson (20 years)
- Account Supervisor – Derek Diaz de Leon (6 years)
- Account Supervisor – TBD
- Account Executive – Paola Aguayo (2 years)
- Account Executive – Cindy Villalta (2 years)
- Junior Account Executive – Alvaro Polanco Jr. (1 year)
- Account Coordinator - Linda Flores (6 years)

6.2.4 Account Planning. Each Proposer must describe the staffing levels and functions of its account planning department, and identify the personnel, including the number of years of experience for each, who will be assigned to the Texas Lottery account. The Account Planner should have a minimum of three (3) years of relevant market analysis experience. Account Planning staff may include the following:

- Account Planner – Carlos Rodriguez – (9 years)
- Account Planner – Sara Michael – (4 years)

6.2.5 Media Staffing. Each Proposer must describe the staffing levels and functions of its media department, and identify the personnel, including the number of years of experience for each, who will be assigned to the Texas Lottery account. The Media Director should have a minimum of five (5) years of relevant media experience and the Media Supervisor should have a minimum of three (3) years of relevant media experience. Media staff may include the following:

- Media Director – Rodrigo Vallejo (15 years)
- Media Supervisor – Kathy Alexander (35 years)
- Media Planner – Jessica Arvelo (14 years)
- Junior Media Planner – Juanita Fierro (6 years)
- Media Supervisor – Lisa Gomez (14 years)
- Media Buyer – Lannette Espino (18 years)
- Junior Media Buyer – Gabriela McClain (4 years)
- Junior Media Planner – Karla Gonzalez (15 years)
- Junior Media Buyer – Whitney Uribe (7 years)

6.2.6 Creative Staffing. Each Proposer must describe the staffing levels and functions of its creative department, and identify the personnel, including the number of years of experience for each, who will be assigned to the Texas Lottery account. The Creative Director should have a minimum of five (5) years of relevant creative experience. Creative staff may include the following:

- Creative Director – Flor Leibaschoff (18 years)
- Associate Creative Director/ Art Director – Luis Enriquez (18 years)
- Art Director – Ruth Lovati (3.5 years)
- Copywriter – Samuel Melgar (17 years)
- Copywriter – Madeleine Glenski (3.5 years)
- Copywriter – TBD

6.2.7 Production Staffing. Each Proposer must describe the staffing levels and functions of its production department, and identify the personnel, including the number of years of experience for each, who will be assigned to the Texas Lottery account. Production staff may include the following:

- Production Manager – Matias Sada (18 years)
- Producer – Cesar Jasso (7 years)
- Producer – Paolo Linares (5 years)
- Print Producer – TBD
- Translator – Jill Natowitz (20 years)
- Programming Specialist – Ovidio Hinojosa (5 years)
- Project Manager - Performed by Cindy Villalta under Account Services
- Traffic Manager - Performed by Linda Flores under Account Services

6.2.8 Experiential Event Staffing. Each Proposer must describe the staffing levels and functions of its experiential department, and identify the personnel, including the number of years of experience for each, who will be assigned to the Texas Lottery account. The Experiential Manager should have a minimum of three (3) years of relevant experiential event and marketing activation negotiation and deliverable management experience. Experiential staff may include the following:

- Experiential Manager – Christian Munoz (5 years)
- Experiential Coordinator - Performed by Alvaro Polanco under Account Services

6.2.9 Finance Staff. Each Proposer must describe the staffing levels and functions of its finance department, and identify the personnel, including the number of years of experience for each, who will be assigned to the Texas Lottery account. Finance staff may include the following:

- Finance Manager – Celeste Ponce (18 years)
- Finance Manager – Tom Lewis (37 years)
- Staff Accountant – Linda Countryman (22 years)
- Billing Coordinator – Selina Smith (4 years)
- Billing Coordinator – TBD

