



**REQUEST FOR PROPOSALS FOR SMALL PURCHASE (UNDER \$50,000)**

**Date Issued:** Wednesday, August 10, 2016

**Description:** Retailer Customer Appreciation Event Services for the South Carolina Education Lottery (SCEL)

**Submit Offer By:** Thursday, August 25, 2016, at 11:00 AM ET (Late proposals **will not** be accepted)

**Questions Must Be Received By:** Wednesday, August 17, 2016, at 3:00 PM ET

Offerors desiring an explanation or interpretation of the solicitation must request it in writing. Oral explanations or instructions will not be binding [See R. 19-445.2042(B)]. Any information given a prospective offeror concerning a solicitation will be furnished promptly to all other prospective offerors as an Amendment to the solicitation, if that information is necessary for submitting offers or if the lack of it would be prejudicial to other prospective offerors.

**Award:** SCEL will award to the highest ranking, responsive and responsible offeror whose proposal is determined in writing to be the most advantageous to the State, taking into consideration price and the evaluation factors set forth in the request for proposals.

The procurement for the services listed herein is pursuant to the Small Purchases procedures of the South Carolina Consolidated Procurement Code which may be over ten thousand dollars but not in excess of fifty thousand dollars [§ 11-35-1550 (2)(c)]. When providing pricing, Offerors shall include all costs for performing the work associated with that price.

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**Submit Proposals/Inquiries/Questions to address, email, or fax below. One (1) additional copy must be submitted with original proposal.**

S.C. Education Lottery  
Attn: SCEL Procurement  
Petrina Marsh  
1333 Main Street, Suite 400  
Columbia, SC 29201  
Phone: (803) 737-2808/Fax: (803) 737-0047/Email: [Petrina.Marsh@sclot.com](mailto:Petrina.Marsh@sclot.com)

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SCEL's Request for Proposal for Small Purchase is conducted under the authority of the South Carolina Code of Laws and State Regulations and is pursuant to all applicable statutes and regulations within the South Carolina Consolidated Procurement Code located on the following link. <http://www.scstatehouse.gov/code/t11c035.php>

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## **I. SCOPE OF WORK**

### **Purpose**

The purpose of this solicitation is to solicit proposals on behalf of the South Carolina Education Lottery (SCEL) from qualified Offerors to provide Retailer Customer Appreciation Event Services in accordance with the requirements stated herein.

**Contract Period**

The estimated start date for this contract is **8/30/2016** and the estimated end date is **12/02/2016**. Dates provided are estimates only. Any resulting contract will begin on the date specified in the notice of award. The estimated end date is not expected to exceed **14** weeks, but may be extended upon agreement and prior approval from both parties.

**Background**

SCEL is a Public Commission and Instrumentality of the State of South Carolina (the State) and operates as an Enterprise Entity. SCEL’s sole purpose is to operate the State’s lottery business and transfer its profits to the State Treasurer for the South Carolina General Assembly to appropriate funding for education. SCEL markets its lottery products, which include instant and terminal games, in a socially responsible manner.

SCEL’s mission is to provide funding to enhance education in South Carolina. SCEL continues to achieve successful results with overall transfers of more than \$4.2 billion since inception and sales of \$1.6 billion in Fiscal Year 2016. SCEL’s places great emphasis on efficiency and maintaining integrity with its employees, players, retailers and vendors. To a great extent SCEL’s success requires a loyal, diverse and well-trained retailer network who also operate at the highest level of ethical standards and who work in a highly efficient and effective manner.

SCEL currently licenses approximately 3,900 retail locations throughout the State. The Lottery employees thirty-nine (39) Marketing Sales Representatives that service these retailers with Lottery tickets and marketing point-of sale material. SCEL also has three (3) regional promotion coordinators that conduct statewide wheel spins and special events. Retailers earn seven (7) percent sales commission on every ticket purchased. SCEL’s retailer commission is among the highest offered by a Lottery in the United States. SCEL offers additional incentives to retailers who sell large winning tickets once they have been redeemed. SCEL continuously seeks to provide its retailers with a supportive work environment and with the resources necessary to achieve successful results.

In order to provide retailers with effective marketing techniques and sales strategies, SCEL conducts statewide retailer customer appreciation events, or “Retailer Rallies,” every other year. This year, SCEL’s Retailer Rallies will be held in nine (9) different geographic locations across the state. The Retailer Rallies will begin in the fall (October) of 2016. Based on previous participation, it is reasonable to expect approximately 1,400 participants for all nine events. A complete listing of the event locations are listed below. SCEL does not anticipate any changes to this listing, but in the event changes are required, the need for these services may be increased or decreased accordingly.

**Retailer Customer Appreciation Event Schedule**

<b>LOCATION</b>	<b>DATE</b>	<b>PROGRAM TIME</b>	<b>FACILITY</b>
Rock Hill	October 26, 2016	9:30 AM-12:00 PM	Baxter M. Hood Continuing Education Center
Anderson	November 2, 2016	9:30 AM-12:00 PM	Anderson Sports & Entertainment Center
Greenville	November 3, 2016	9:30 AM-12:00 PM	TD Convention Center
Columbia	November 9, 2016	9:30 AM-12:00 PM	Columbia Metropolitan Convention Center
Aiken	November 10, 2016	9:30 AM-12:00 PM	USC Aiken Convocation Center
Florence	November 16, 2016	9:30 AM-12:00 PM	SMG Florence Civic Center
Myrtle Beach	November 17, 2016	9:30 AM-12:00 PM	Sheraton Myrtle Beach Convention Center Hotel
Beaufort	November 30, 2016	9:30 AM-12:00 PM	Holiday Inn
Charleston	December 1, 2016	9:30 AM-12:00 PM	Embassy Suites Charleston Area Convention Center

**Services Required**

SCEL’s Sales and Product Relations Department seeks assistance with the development and delivery of statewide Retailer Customer Service Appreciation Events (the “Events”) which provide effective strategies and techniques designed to improve customer service and increase lottery sales. SCEL seeks to enrich the customer’s experience of playing the lottery with a highly motivated, productive, and diverse retailer network. SCEL recognizes that it must reward its retailers’ efforts through customer appreciation events in order to achieve and sustain its mission. The Offeror must be enthusiastic and have a broad understanding of SCEL and it’s entire product line.

The project shall include, but is not limited to the following activities:

### **Retailer Customer Service Training**

Offeror must provide comprehensive and quality Retailer Customer Service Training in statewide group training sessions. Program content must be designed to improve the retailers' ability to provide outstanding and effective customer service to lottery players, thus enriching the lottery playing experience and increasing sales. Examples of techniques and strategies used to provide comprehensive and quality Retailer Customer Service Training include:

1. Emphasize the significance of customer service skills and the impact first impressions make when greeting and assisting lottery customers;
2. Provide retailers' with valuable communication methods that include practicing the art of attentive listening and learning how to ask customers' effective questions which are designed to increase lottery sales;
3. Teach retailers' how to gain an understanding of various behavioral styles and improve communication through recognizing customers' style differences;
4. Identify specific techniques for managing challenging customers and difficult situations;
5. Conduct and host various games that require player participation, specifically lottery related games, designed to convey the purpose of the program's content; and,
6. Recommend any additional effective teaching methods, techniques and strategies that are designed to improve customer service and increase sales.

## **II. PROPOSAL INFORMATION FOR OFFERORS TO SUBMIT**

All proposals must be complete and carefully worded and must convey all of the information requested by SCEL. If significant errors are found in the Offeror's proposal, or if the proposal fails to conform to the essential requirements of the RFP, SCEL alone will be the judge as to whether that variance is significant enough to reject the proposal. Proposals must provide a straightforward, concise description of the Offeror's capabilities to satisfy the requirements of the RFP. Proposals which include either modifications to any of the contractual requirements of the RFP or an Offeror's standard terms and conditions may be deemed non-responsive and therefore not considered for award.

To be considered for award, all proposals should be organized to clearly address the following requirements, as a minimum. **All information must be presented in the listed order:**

### **A. Cover Letter**

Offerors must provide a cover letter which includes a summary of the Offeror's ability to perform the services described herein and a statement that the Offeror is willing to perform those services and enter into a contract with SCEL. The cover letter must be signed by a person having the authority to commit the Offeror to a contract. The cover letter must include the representative's name, title, address, telephone number, e-mail address and any other appropriate means for contact of the representative.

### **B. Statement of Methods and Procedures**

1. Provide a statement describing the Scope of Work as you understand it, and describe the approach, means, methods and procedures to be used in the development and delivery of SCEL's statewide Events.
2. Describe the way in which the event program will be structured and presented.

### **C. Qualifications of Offeror**

Offerors must include all pertinent information to substantiate their qualifications and capabilities to perform the services described in the scope of work including:

1. Prior experience as a Master of Ceremonies and hosting customer appreciation events in the public gaming industry, public lotteries, and/or any other business entities for which comparable services have recently been rendered. A minimum of five years of experience as described above is required. Prior broadcast experience is desired.
2. Prior experience conducting and hosting various games that require player participation, specifically lottery related games.
3. Thorough experience in working with lottery retailers and knowledge of how lottery products are sold.

4. The demonstrated ability to communicate well with a diverse group of people who may have different educational levels and work experience.
5. At least three (3) references that SCEL may contact regarding the evaluation of prior services performed as requested in this RFP. References must include the business name, contact name, address, telephone number, e-mail address, and name of company website if available.

#### **D. Qualifications of Assigned Personnel**

1. Offeror must identify a single point of contact which will serve as senior program manager and focal point for all SCEL services.
2. Offeror must provide a list of all proposed individuals to be assigned to this project and the specified assigned responsibilities of such individual to this project. For each assigned individual the Offeror must also describe relevant work experience summarizing the qualifications and experience of the individuals who will be assisting with the development and delivery of SCEL's statewide Events.
3. Offeror must confirm that the level of service (including experience and hours) committed to SCEL in this proposal shall be maintained throughout the contract and that SCEL shall preapprove any replacements made in key personnel assigned to the SCEL account.

#### **E. Work Schedule**

Offeror must provide a proposed timeline and payment schedule based upon the Event Schedule as provided in this Proposal.

#### **F. Fee**

The fee proposal shall be SEALED in a separate envelope, which will not be opened until after other factors have been considered. The fee should include a breakdown of the Offeror's rates, fees and charges for services, by event and date, and a proposed payment schedule.

#### **G. General Information**

Offerors shall submit any additional information for consideration such as specialized services, available staffing or other pertinent information the Offeror may wish to include.

### **III. AWARD CRITERIA**

#### **Award Criteria**

Award will be made to the highest ranked, responsive and responsible offeror whose offer is determined to be the most advantageous to the State. [06-6030-1]

#### **Evaluation Factors**

Each proposal that is, in the opinion of South Carolina Education Lottery, in full compliance with the mandatory requirements of the RFP will be evaluated using only the factors stated below. Evaluation factors are stated in the relative order of importance, with the first factor being the most important. Once evaluation is complete, all responsive offerors will be ranked from most advantageous to least advantageous. [06-6065-1]

#### **Technical Proposal**

- A. Ability of the Offeror to conduct comprehensive services for SCEL's Events, including a full description of the methodology and techniques the Offeror will use in the development and delivery of the Events which provide effective strategies and techniques designed to improve customer service and increase lottery sales. This includes a description of effective strategies and techniques to be used and the submission of any forms, questionnaires, technological resources and/or instruments proposed for use in the program as set forth in Section 1, Scope of Work.
- B. Ability of the Offeror to provide substantive evidence of qualifications, experience, staffing capabilities, and credentials to perform and satisfy the requirements as described in Section 1, Scope of Work.

### **Price Proposal**

- A. Ability of the Offeror to provide a breakdown of rates, fees and charges for services, by event and date, and for total project.
- B. Ability of the Offeror to address their method of determining the timeline and payment schedule for all events and phases of the program.

## **IV. GENERAL TERMS AND CONDITIONS**

### **Event Staffing**

Program Services must be performed in accordance with SCEL Retailer Event Procedures. Offeror must provide appropriate and adequate staffing to support and operate the program events successfully. Offeror must physically position designated staff (“Offeror’s Staff” or “Staff”) within the Events during specified dates and times as directed. If the Offeror’s Staff is injured or becomes ill and is unable to operate the Event(s), the Offeror must provide alternative staffing support as deemed acceptable by SCEL. The Staff assigned to SCEL’s retailer rally facilities by the Offeror will be considered the Offeror’s Staff and will not be considered staff of SCEL.

SCEL shall have the right to interview, screen, test, accept or reject any of the Offeror’s Staff who may be assigned to this project. The Offeror shall use its best efforts not to assign any of its Staff, who, to its knowledge, were previously terminated for cause or are currently suspended from employment of SCEL.

### **Subcontractor**

The Offeror may use Subcontractors to provide Event services as contemplated under this RFP. In the event the Offeror utilizes the services of a Subcontractor, the Subcontractor will be considered as the Offeror’s Staff by SCEL and therefore, subject to the same requirements as the Offeror’s Staff as discussed above under the captions, **“Qualifications of Assigned Personnel” and “Event Staffing.”** The Offeror must submit information or documentation for any Subcontractor (at any tier level) pursuant to the Subcontractor-Identification clause as defined in SC Code Section 11-35-5030-2.

### **Payment for Subcontractor Services**

The Offeror will be responsible for engaging the services of any Subcontractor. The Subcontractor, if designated to perform services for a specific event(s), shall be paid for their services, including expenses incurred by the Subcontractor, by the Offeror. All matters concerning wages, expenses, hours worked and paid, working conditions and other similar administrative matters shall be resolved between the Offeror and its Subcontractor and not between the Subcontractor and SCEL.

### **Invoices and Billing**

Invoices or other billings, including expense reimbursements, shall be submitted to SCEL in writing within thirty (30) days of when services were provided and must include a description of the services being billed, including Staff names, dates, hours worked, and the applicable rate.

Invoices shall include any travel expenses incurred by the Offeror necessary to perform the requested services. The Offeror may be reimbursed for mileage at the current rate established by the Internal Revenue Service. Meals may also be reimbursed when travel requires an overnight stay. Meal reimbursements will be based on actual meal receipts and shall not exceed the State’s maximum reimbursement of \$25.00 per day for In-State travel. SCEL will pay for hotel accommodations for the Offeror’s Staff with reservations being made in advance by SCEL. Hotel accommodations provided to the Offeror’s Staff will be the same accommodations provided to SCEL staff. The Offeror must provide a receipt(s) for any reimbursement requests.

The Offeror shall be responsible for withholding Federal and State income taxes, paying Federal Social Security Taxes, unemployment insurance and maintaining worker’s compensation insurance coverage in an amount and under such terms as required by the State of South Carolina.

**Insurance**

The Offeror shall maintain, or cause its Subcontractors to maintain, the following insurance coverage for itself, its Staff and/or Subcontractors providing services under this contract. The Offeror shall provide copies of certificates of insurance to SCEL showing the types, amount, class of operations covered, effective dates of expiration of policies prior to providing services under this contract. In addition, the Offeror shall provide notification to SCEL in writing of any change(s) in policy coverage along with verification of information as required above.

**Conformity with Rules, Regulations, Licensing Laws, etc.**

The Offeror and its Subcontractors shall abide by all applicable rules, regulations, or policies established by SCEL and/or the facility on whose premises the Offeror and/or its Subcontractors perform services. SCEL shall provide materials to the Successful Offeror regarding policies, regulations, and procedures of the retailer events.

Further information regarding SCEL or its enabling legislation may be found on the links provided below.

SCEL: <http://www.sceducationlottery.com>

S.C. Code of Laws §59-150-10 to §59-150-410: <http://www.scstatehouse.gov/code/t59c150.php>

S.C. Code of State Regulations §44-10 to §44-140: <http://www.scstatehouse.gov/coderegs/Ch%2044.pdf>

**Dispute Resolution**

The following provision from the S.C. Code of Laws is provided as information and will be applied to the solicitation. In submitting a proposal with an actual or potential value of up to fifty thousand dollars, the Offeror understands that that there is no right to protest this solicitation or the resulting award. [Section 11-35-4210(1)(d)]

**Equal Opportunity**

Contractor is referred to and shall comply with all applicable provisions, if any, of Title 41, Part 60 of the Code of Federal Regulations, including but not limited to Sections 60-1.4, 60-4.2, 60-4.3, 60-250.5(a), and 60-741.5(a), which are hereby incorporated by reference. [07-7A030-1]

**Open Trade**

During the contract term, including any renewals or extensions, Contractor will not engage in the boycott of a person or an entity based in or doing business with a jurisdiction with whom South Carolina can enjoy open trade, as defined in SC Code Section 11-35-5300. [07-7A053-1]

**Nonresident Taxpayer Registration Affidavit**

Nonresident taxpayers are required to register with the S.C. Secretary of State or the S.C. Department of Revenue (SCDOR). For additional information, contact the SCDOR, Offices Services Division, at (803)898-5000.

**Tax Identification Number**

"Taxpayer Identification Number (TIN)," means the number required by the Internal Revenue Service (IRS) to be used by the Offeror in reporting income tax and other returns. There are a variety of numbers that may be used, including Social Security and others. If the Offeror does not have a TIN, more can be learned about this and application can be made for one at: <https://www.irs.gov/businesses/small-businesses-self-employed/employer-id-numbers-eins>.

**Tax Credit for Subcontracting with Small and Minority Businesses**

Vendors interested in income tax credit availability by subcontracting with certified minority firms should contact the Office of Small & Minority Business Assistance (OSMBA). OSMBA was created to assist Small and Minority Businesses in the State of South Carolina. For further information, phone (803) 734-5010.