



TITLE PAGE:

TECHNICAL PROPOSAL

SOLICITATION NO.: CRFP LOT2500000001

Subject: RFP - Lottery Marketing and Advertising Services

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A handwritten signature in blue ink, appearing to be 'B. Jarvis', written over a horizontal line.

Brian Jarvis, Vice-President

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RESPONSE FOR REQUEST FOR
QUOTATION

WV LOTTERY MARKETING & ADVERTISING

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INTRODUCTION

InnerAction Media (IAM) is honored to present our comprehensive response to the West Virginia Lottery's Request for Proposal (RFP) for Marketing and Advertising Services. With over a decade of experience in the advertising and marketing sector, IAM has proudly served a wide range of clients across West Virginia, including state agencies, private organizations, and businesses in both the retail and entertainment sectors. Our expertise in media planning, creative services, public relations, and digital marketing, combined with our commitment to client success, positions us as a valuable partner for the West Virginia Lottery.

As a full-service marketing agency headquartered in Morgantown, West Virginia, IAM brings a deep understanding of the state's unique media landscape, consumer behavior, and market trends. Our approach to marketing is not only innovative but also data-driven, ensuring that all campaigns are optimized for maximum reach and return on investment (ROI). We are committed to delivering customized marketing solutions that reflect the West Virginia Lottery's values of responsibility, integrity, and entertainment.

Our proposal outlines our strategy for achieving the Lottery's goals, from in-person representation and 24/7 communication, to media planning, public relations, and brand positioning. Our team is dedicated to providing high-quality service, creative content, and timely execution that will help the West Virginia Lottery grow its brand presence and achieve its marketing objectives.

IAM looks forward to the opportunity to collaborate with the West Virginia Lottery and deliver exceptional results that align with its vision and goals. This proposal not only meets the mandatory requirements of the RFP but also offers a strategic and comprehensive plan to elevate the Lottery's marketing efforts to new heights.

InnerAction Media (IAM) Response to the West Virginia Lottery RFP

Section 4.2 - Project Goals and Mandatory Requirements

4.2.1 Goals and Objectives

4.2.1.1 In-Person Representation & 24/7 Communication

At IAM, we pride ourselves on our commitment to client success, providing continuous support for all our projects. We understand the need for consistent communication and flexibility, especially for high-priority accounts like the West Virginia Lottery.

- **In-Person Representation:** We maintain a team that is available for in-person meetings at the Lottery headquarters within 60 minutes of notice, 24/7, 365 days a year. Our office in Morgantown, West Virginia, ensures proximity and quick response times.
 - **Consistent Communication:** Our approach involves regular check-ins, weekly status updates, and immediate responsiveness to any Lottery requests for media events or special promotions. We utilize various channels such as Zoom, phone, and email to ensure continuous communication.
 - **Dedicated Account Team:** Our primary account representative will be available around the clock to meet the needs of the Lottery, with full access to transportation to ensure all requests are met in person or remotely.
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4.2.1.2 Public Relations Services

IAM's public relations (PR) team brings over a decade of experience managing PR campaigns for state agencies and private organizations. Our PR strategies focus on:

- **Media Relations:** Building strong connections with West Virginia media outlets to ensure positive press coverage for Lottery events and initiatives.
 - **Crisis Management:** We develop well-structured plans for any unforeseen circumstances, ensuring that the Lottery's reputation remains intact.
 - **Community Engagement:** Our PR efforts also focus on fostering strong relationships between the Lottery and the communities it serves, ensuring positive brand perception throughout the state.
-

4.2.1.3 Media Selection and Brand Positioning

To provide comprehensive recommendations for media selection, IAM uses a thorough, data-driven approach:

1. **Market Research:** We begin by analyzing the target audience and media consumption trends specific to West Virginia, using platforms like Nielsen and Google Analytics to ensure insights are precise.
 2. **Media Mix Optimization:** Based on research, we develop a strategic mix of traditional (TV, radio, print) and digital (social, Google Ads, YouTube) media to optimize reach and ROI.
 3. **Brand Positioning:** Our creative team collaborates with Lottery staff to ensure that all campaign messaging reflects the Lottery's brand values—responsibility, integrity, and entertainment. We deliver copywriting, visuals, and themes that resonate with the audience while staying true to the Lottery's established brand.
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4.2.1.4 Media Placement Strategy in the West Virginia Market

IAM's media placement strategy is tailored to West Virginia's unique market:

- **Local Expertise:** With our headquarters in Morgantown, WV, we have in-depth knowledge of the state's media landscape. We work closely with local TV, radio, and print outlets to negotiate the best rates and secure prime placements.
 - **Digital Integration:** In addition to traditional media, we specialize in targeted digital advertising, ensuring that Lottery ads are placed on high-traffic websites, social platforms, and programmatic networks.
 - **Fast Turnaround:** We understand the importance of timely action. All media placements and cancellations will be completed within five (5) days of the Lottery's request.
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4.2.1.5 Post-Buy Analysis and Campaign Reporting

After each campaign, IAM conducts a thorough post-buy analysis to evaluate its success. This includes:

- **Key Performance Indicators (KPIs):** We measure metrics such as impressions, reach, frequency, engagement, and conversions, providing detailed reports to the Lottery..
- **Tools & Strategies:** Using industry-standard tools like Google Analytics and Nielsen data, we assess media performance across all channels.

- **Lessons Learned:** We offer a debrief session to highlight campaign performance, successes, and areas for improvement, ensuring each future campaign is even more effective.
-

4.2.2 Mandatory Project Requirements

4.2.2.1 Dedicated Account Representatives

IAM will assign a minimum of two full-time employees as account representatives, ensuring 24/7 availability for the West Virginia Lottery. Our primary representative will be on-call 24 hours a day, seven days a week, and will be able to attend in-person meetings at Lottery Headquarters within 60 minutes. We are committed to providing responsive and high-quality service throughout the contract.

4.2.2.2 Pickup and Delivery of Materials

IAM offers consistent, reliable pickup and delivery services of any work-related materials or documents needed by the West Virginia Lottery. Our proximity to the Lottery's headquarters allows for fast turnaround times, ensuring no delays in material delivery.

4.2.2.3 Lottery Ticket Restrictions Compliance

IAM understands the importance of maintaining the integrity of the West Virginia Lottery. We will obtain signed agreements from all relevant staff, ensuring no individual involved with the Lottery account participates in Lottery gaming. This compliance measure will prevent any conflicts of interest or infractions.

4.2.2.4 Monthly and Annual Expenditure Reports

IAM will provide detailed monthly summaries and annual cumulative reports of all actual and projected expenditures. These reports will be available in Excel spreadsheet format and will be organized by Lottery-specified categories. In addition to expenditure reports, IAM will offer comprehensive analysis of campaign costs, tracking both trackable and non-trackable media for future evaluation.

4.2.2.5 Software Compatibility

IAM possesses the necessary licensed software, including the latest version of Adobe Creative Suite, for creating, editing, and processing all media and marketing materials. We are fully equipped to handle both Macintosh and PC formats and will seamlessly exchange files with the Lottery through an SFTP platform or other requested digital transfer methods.

4.2.2.6 Data Acceptance & Transfer Methods

IAM is fully equipped to accept and transfer data electronically through various means, including disk, USB drives, CD, and other secure file transfer protocols. We use SFTP (Secure File Transfer Protocol) to ensure data is exchanged securely between our team and the Lottery, with all sensitive information properly encrypted and protected throughout the process.

4.2.2.7 Talent Acquisition for Productions

IAM will handle all talent acquisition needs for media productions, whether radio, television, or digital. We prioritize West Virginia-based talent whenever possible and will negotiate favorable rates with Screen Actors Guild (SAG) and American Federation of Radio and Television Artists (AFTRA) talent when necessary. All talent releases will be filed appropriately, and IAM will ensure compliance with the Lottery's production standards.

4.2.2.8 Legal Licensure and Rights Management

IAM takes copyright and trademark management seriously. We conduct thorough legal searches for all stock photography, music, film segments, and other copyrighted materials, ensuring all media used is properly licensed and legally compliant.

4.2.2.9 Ad Hoc Research and Analysis

IAM has extensive experience working with independent research firms to conduct qualitative and quantitative analyses. Our approach to ad hoc research includes:

- **Selection of Qualified Firms:** We collaborate with top-tier research firms based on the specific project needs, methodologies, and cost-effectiveness to ensure the best possible outcomes.

- **Comprehensive Research Methodologies:** IAM works with partners who specialize in market research, including web-based surveys, quantitative game analysis, and focus groups. We gather insights on consumer behaviors, attitudes, and preferences to shape campaigns that resonate with the target audience.
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4.2.2.10 Design and Production of Multi-Platform Advertising Materials

IAM is a full-service creative agency with a proven track record of designing and producing advertising materials across multiple platforms. Our services include:

- **TV, Radio, and OOH (Out of Home) Advertising:** We create engaging TV and radio ads with the help of our in-house video production team. Our OOH advertising strategies, including billboards and transit ads, are designed to maximize visibility and engagement.
 - **Digital and Mobile Platforms:** IAM has a strong background in developing content for digital advertising, including display ads, mobile platforms, and social media. Our designs are optimized for cross-device use, ensuring a seamless experience across desktops, tablets, and smartphones.
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4.2.2.11 Contracts for Media Placements and Other Services

IAM has extensive experience in managing both short-term and long-term contracts for a variety of media and promotional services. For the West Virginia Lottery, we will:

- **Media Buying and Negotiations:** IAM will handle media buying for TV, radio, OOH, print, and digital platforms, negotiating the most competitive rates on behalf of the Lottery.
 - **Contract Management:** We maintain an organized approach to contract management, ensuring that all contracts are fully transparent and approved by the Lottery before execution.
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4.2.3 Creation and Delivery of Promotional Materials

InnerAction Media (IAM) has extensive experience in designing, producing, and delivering promotional materials for a wide range of marketing activities. For the West Virginia Lottery, IAM will provide the following services:

- **Marketing Supplies and Promotional Materials:** We will design and produce high-quality marketing materials such as brochures, posters, and banners, ensuring consistent branding across all materials.
- **Drawing Equipment and Services:** IAM will handle the production and delivery of equipment and services required for Lottery draws, including promotional signage and technical support.
- **Point-of-Sale (POS) Materials:** IAM will design and deliver POS materials to retailers, ensuring clear and attractive displays that promote Lottery games and special promotions.
- **Promotional Items and Prizes:** We will provide a range of promotional items, including branded merchandise and promotional prizes, designed to enhance consumer engagement and loyalty.
- **Signage for Retailers:** IAM will produce semi-permanent signage to be displayed at Lottery retailers, improving visibility and increasing brand presence at the point of sale.

4.2.4 Transparency and Record-Keeping

InnerAction Media (IAM) adheres to strict transparency and record-keeping practices for all work conducted on behalf of the West Virginia Lottery. In compliance with Lottery requirements, all contracts, papers, correspondence, books, vendor expenses, and other relevant information related to Lottery business will be kept open for inspection by authorized Lottery representatives at any reasonable time.

4.2.5 Record-Keeping for Subcontracts

IAM maintains detailed records of all transactions, including subcontractor agreements and contracts, for a minimum of five (5) years for billing and audit purposes. Additionally, the Lottery's Advertising Manager will be copied on all external communications with production companies, media outlets, or third-party service providers.

4.2.6 Transfer of Native Files and Property Ownership

IAM guarantees that all native files, including licensed fonts, images, layouts, sketches, and any digital files used for the Lottery's advertising projects, will become the property of the Lottery upon completion. These files will be delivered on an external drive, and all non-consumable materials or props purchased for productions will also become the property of the Lottery.

4.2.7 Financial Commitment

The Lottery shall have the full and free right to possess and use any and all property in any way without additional costs beyond the initial creative and production hourly rates. IAM possesses the financial resources necessary to commit a minimum of \$1.5 million for media purchases and pass-through expenses on behalf of the Lottery at any given time. To meet this requirement, we will provide audited financial statements for the past three years prior to contract award, ensuring transparency and compliance with the Lottery's financial protocols.

4.2.8 Work Approval and Cost Control

All work initiated by IAM for the West Virginia Lottery will be pre-approved by the Lottery, ensuring that no costs are incurred without prior authorization. We work closely with Lottery staff to review, revise, and approve creative concepts, media plans, and promotional strategies, ensuring that all expenditures align with the Lottery's goals and budget constraints. Any work initiated without written approval will not be charged to the Lottery.

4.2.9 Media Discounts and Post Audits

IAM will ensure that all media cash discounts, rebates, and frequency discounts are passed directly to the Lottery. We will also conduct post-audits to verify that all purchased media was aired or placed according to the buy plan. If discrepancies are found, IAM will request refunds or compensation on the Lottery's behalf. We will provide the Lottery with all necessary broadcast affidavits and invoices, ensuring full transparency and accountability.

4.2.10 Payment Processing for Third-Party Providers

IAM will manage the payment of third-party providers (e.g., production companies, media outlets) on behalf of the Lottery. Our payment processing services are included in our hourly rate for account management, ensuring seamless handling of invoices. All payments to third parties will be processed within 7-10 days of approval, adhering to the payment terms and conditions specified by the Lottery.

4.2.11 Competitive Cost Estimates

For all products and services secured on behalf of the Lottery, IAM will request competitive cost estimates from a minimum of three (3) subcontractors or vendors. This process ensures that the

Lottery receives high-quality services at the best possible price. For any media buys or services that are sole-source, IAM will provide written justification and obtain Lottery approval before proceeding.

4.2.12 Annual Contracts for Recurring Costs

IAM will manage annual contracts for recurring costs, including point-of-sale materials, Lottery publications, and any other printed or promotional items required by the Lottery. These contracts will be negotiated to ensure cost efficiency and will include detailed project scopes for Lottery review and approval.

Section 4.3 - Qualifications and Experience

4.3.1 Vendor Qualification and Experience Information

4.3.1.1 Minimum of Five (5) Years of Experience in Advertising Services

InnerAction Media (IAM) is the leading marketing and advertising agency based in Morgantown, West Virginia, with over 13 years of experience. IAM has successfully delivered integrated marketing solutions for a variety of industries, including government agencies, educational institutions, and private sector businesses. Our services encompass all facets of advertising, including:

- **Creative Campaign Development:** IAM's creative team produces compelling, narrative-driven campaigns across digital, print, TV, and radio channels.
- **Media Buying and Placement:** Our media experts strategically plan and purchase media space across platforms, ensuring optimal exposure and cost-efficiency.
- **Social Media Management:** IAM excels at crafting and executing social media strategies that build engagement and drive results across Facebook, Instagram, TikTok, Twitter, and LinkedIn.
- **Paid Search and Display Advertising:** As a certified Google Premier Partner, IAM's team is adept at managing large-scale paid search and display advertising campaigns on Google Ads, YouTube, and programmatic platforms.
- **Public Relations & Professional Messaging:** Our PR team creates targeted communications and messaging strategies that align with both short- and long-term campaign goals.
- **Market Research & Data Analytics:** Through comprehensive research and data-driven analysis, we ensure that campaigns are continuously optimized for success, with clear insights into performance and audience engagement.

With a strong commitment to delivering high-quality work on time and within budget, IAM has a proven record of success that makes us the ideal partner for the West Virginia Lottery.

Staff Certifications and Relevant Qualifications

IAM's team is composed of industry veterans and specialists, with many holding key certifications to ensure they remain at the forefront of advertising innovation:

- **Jim Matuga (Founder & CEO):** With over 35 years in the industry, Jim Matuga leads the team with deep expertise in strategic communication and leadership across various media types. He holds a **B.S. in Advertising** from West Virginia University and extensive experience with local, state, and regional markets.
- **Dylan Sheldon (VP of Operations):** Dylan is responsible for client relations and business development, with a focus on fostering long-term partnerships and ensuring campaign objectives are met.
- **Liza Heiskell (Creative Director):** Liza leads the video production team with a passion for storytelling, overseeing the creative direction of both digital and traditional media campaigns.
- **Bethany Friend (Senior Marketing Specialist & Social Media Manager):** Bethany drives high-engagement social media strategies that are tailored to the specific goals of each client.
- **Gabe Ofca (Director of Photography):** Gabe ensures all visual content aligns with the creative vision of the campaign, specializing in video storytelling.

These certifications and expertise demonstrate IAM's capability to exceed client expectations while delivering cutting-edge, data-driven marketing solutions.

4.3.1.2 Staffing and Compliance with Experience Requirements

IAM's staffing and team structure are designed to meet the needs of large-scale, complex projects like the West Virginia Lottery's marketing and advertising campaign. Our compliance with experience requirements will be verified through the submission of client references, project documentation, and performance records that demonstrate our capacity to deliver outstanding results for similarly scaled projects.

We will provide detailed references from previous clients, highlighting our ability to handle the multifaceted responsibilities of marketing campaigns, such as media buying, creative direction, public relations, and digital marketing. These references will showcase:

- **Proven Expertise:** A record of delivering successful marketing solutions for state agencies, local governments, and major private sector clients.

- **Project Management:** Evidence of our strong project management abilities, including the capacity to meet tight deadlines, allocate resources efficiently, and provide consistent updates to clients.
- **Client Satisfaction:** High client satisfaction rates, supported by testimonials and documented outcomes of past projects.

IAM will submit all requested documentation to support compliance with the state’s evaluation process, ensuring that the Lottery has a clear understanding of our experience, capabilities, and results.

4.3.1.2.1 Company Description, History, and Organizational Chart

InnerAction Media (IAM) is a full-service marketing and advertising agency with over 10 years of experience in developing integrated marketing solutions. Founded in 2011 and headquartered in Morgantown, West Virginia, IAM has become a trusted partner for businesses and government agencies across the state and region.

Organizational Structure

IAM’s team is composed of a diverse group of experts, each bringing specialized skills in areas such as creative design, digital marketing, media planning, and public relations. Below is an overview of key team members assigned to this project:

- **Jim Matuga**, President and CEO: With over 35 years of experience in advertising and media, Jim leads the strategic direction of the company.
- **Dylan Sheldon**, Vice President of Operations: Dylan oversees business development and client relations, ensuring smooth communication between the client and the IAM team.
- **Liza Heiskell**, Creative Director: Liza leads IAM's creative efforts, bringing more than 10 years of experience in video production and multimedia storytelling.
- **Bethany Friend**, Senior Marketing Specialist: Bethany manages social media campaigns, ensuring high engagement and brand consistency.
- **Gabe Ofca**, Director of Photography: Gabe specializes in video production, capturing compelling visual content that aligns with client objectives.

IAM’s organizational structure allows for specialized attention to each aspect of a campaign, ensuring that all deliverables meet the highest standard. The company operates with 20 full-time staff members, each with a clearly defined role, backed by their educational backgrounds and industry certifications. This robust team structure allows IAM to dedicate resources where they are needed most, providing comprehensive marketing services across all platforms.

4.3.1.2.2 Staffing Levels and Resource Allocation

IAM is fully equipped to meet the staffing requirements of this contract without the need for additional hires. Our full-time staff is highly experienced in managing large-scale projects, and our organizational framework is designed to scale up or down depending on the demands of the project.

For the West Virginia Lottery contract, IAM will allocate a dedicated team of at least 10 full-time professionals, ensuring full coverage of the various aspects of the campaign, including:

- **Account Management:** Two full-time account representatives will oversee all client communications, ensuring 24/7 availability and quick responses to the Lottery's needs.
- **Creative and Media Teams:** A team of five full-time creative specialists, including designers, copywriters, and media planners, will handle content creation, media placement, and campaign execution.
- **Analytics and Research:** Three team members will be assigned to monitor campaign performance, conduct post-buy analysis, and report on KPIs.

IAM also has access to a network of trusted freelance professionals who can be brought on board if the project scope expands. However, based on our assessment of the Lottery's needs, we believe our current staffing levels are more than sufficient to handle the project in its entirety. All necessary documentation related to staffing levels, roles, and responsibilities will be provided upon request.

4.3.2 Project Examples and References

IAM has delivered successful, large-scale marketing campaigns for a variety of clients. Below are examples of similar work that highlight our ability to meet the objectives of the West Virginia Lottery campaign (see Exhibit A for sample creative):

Example 1 (statewide or national campaign):

- **Client:** Elevating the Outdoors (State of Maryland Department of Commerce)
- **Project Manager:** Dylan Sheldon, Contact: dylan@inneractionmedia.com
- **Project Type:** Regional economic development and workforce recruitment campaign
- **Objective:** Both Allegheny and Garrett counties in Western Maryland are poised for growth in outdoor recreation manufacturing. The problem was that we needed to attract individuals who could align with that vision and see it through. The goal was to identify and focus on the specific attributes of Western Maryland that we could market to prospective business owners and employees.

- **Outcome:** InnerAction Media was tasked by the State of Maryland Department of Commerce to create a marketing campaign with the goal of attracting outdoor recreation and lifestyle manufacturing companies to locate, expand, and grow in Western Maryland. Ultimately transforming the area into an outdoor recreation and lifestyle manufacturing hub, creating jobs, leveraging private investment and using the region's access to natural resources as the main attraction.
- "InnerAction Media played such an important role in the development of a regional business attraction campaign for our region. They thoughtfully listened and engaged with our stakeholders and our workgroup and were able to produce a campaign that really drove home our messaging strategies. Their work is beautiful, emotionally driven, and something we are all very proud of." Ashli Workman, Director of Tourism, Allegany County Government

Example 2 (advertising campaign promoting a product):

- **Client:** WVU Medicine Heart & Vascular Institute
- **Project Manager:** Jim Matuga, Contact: jim@inneractionmedia.com
- **Project Type:** Video production and digital marketing campaign
- **Objective:** InnerAction Media has been providing video production services to WVU Medicine Heart & Vascular Institute for three years. We have successfully executed several video marketing and advertising campaigns. The goal of these campaigns has been to shed light on the incredible work happening at WVU Medicine Heart & Vascular Institute and positioned them as an authority in their industry.
- **Outcome:** "It has been a pleasure working with InnerAction on several initiatives. They have always been highly professional, efficient with their use of film time, and effective with their deliverables. They capture our most important tenor of caring deeply for the outcomes of our patients while providing a message that is relatable to all we serve." Dr. Vinay Badhwar, Executive Chair of WVU Heart and Vascular Institute

Example 3 (branding campaign):

- **Client:** The United Federal Credit Union
- **Project Manager:** Hampton Hill, hampton@inneractionmedia.com
- **Project Type:** Rebranding, Digital marketing and advertising campaign
- **Objective:** InnerAction Media partnered with The United Federal Credit Union to execute a comprehensive rebranding campaign. The objective was to modernize the brand while honoring its rich history. In addition to rebranding, we guided them through a strategic marketing and advertising campaign, which included video storytelling, social media management, content creation, the development of a new website, and a targeted digital advertising campaign.

- **Outcome:** The rebranding and marketing efforts for The United Federal Credit Union resulted in a fresh, modernized brand identity that resonates with both long-standing members and new customers. The campaign successfully honored the credit union's legacy while positioning it for future growth. Through engaging video storytelling, dynamic social media presence, and targeted digital advertising, The United Federal Credit Union experienced increased brand visibility and customer engagement. The launch of a new, user-friendly website further enhanced the customer experience, leading to stronger brand loyalty and an expanded member base."
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4.3.3 Conclusion

InnerAction Media (IAM) not only meets the mandatory qualifications for this RFP but also surpasses them. With a decade of experience, a fully certified and experienced team, and a history of successful campaigns, IAM is well-positioned to lead the West Virginia Lottery's marketing efforts. We are confident that our innovative strategies, attention to detail, and commitment to excellence will help the West Virginia Lottery achieve its marketing and advertising goals.

4.4 Mandatory Qualification/Experience Requirements

The following are the mandatory qualifications and experience requirements that InnerAction Media (IAM) meets or exceeds for the West Virginia Lottery's Marketing and Advertising Services RFP. IAM brings a wealth of expertise across the retail and entertainment industries, ensuring that we not only fulfill the Lottery's needs but also surpass them in several key areas.

4.4.1 Marketing Experience in the Retail and/or Entertainment Industry

IAM possesses extensive marketing experience in both the retail and entertainment sectors. Over the past 10 years, we have developed and executed campaigns for numerous clients in these industries, ranging from retail chains to entertainment venues and events. Our ability to adapt marketing strategies to various consumer-focused industries ensures that we can effectively promote the West Virginia Lottery's offerings.

Examples of our experience include:

- **Retail Marketing Campaigns:** IAM has partnered with several regional and national retail brands to develop multi-channel marketing strategies aimed at driving foot traffic, increasing brand awareness, and boosting sales.

- **Entertainment Industry Experience:** We have also worked on marketing for entertainment clients, including event promotion, sponsorship activation, and media buys for live shows and festivals. Our campaigns have driven significant engagement and attendance at events across West Virginia and beyond.
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4.4.1.1 Staffing Requirements

IAM has a dedicated team of professionals in each of the required areas. Below is a summary of our staff, their roles, and experience in meeting the needs of this contract:

- **Graphic and Multimedia Design:** Our Creative Director, **Liza Heiskell**, leads the design team, bringing over 10 years of experience in multimedia and graphic design, including video production and digital content creation.
- **Creative Development:** **Jim Matuga**, IAM's President, and CEO, oversees the creative direction, ensuring campaigns align with the client's vision and objectives. His 35 years of experience in the marketing field ensure top-tier creative strategies.
- **Media Planning and Buying:** **Dylan Sheldon**, Vice President of Operations, leads our media buying team. He has extensive experience securing prime media placements at competitive rates across TV, radio, print, and digital platforms.
- **Social Media Development:** **Bethany Friend**, Senior Marketing Specialist, is responsible for developing social media strategies and managing campaigns across platforms like Facebook, Instagram, LinkedIn, and Twitter.
- **Accounts Payable and Receivable:** IAM's financial department is led by **Brian Jarvis**, who oversees all billing, invoicing, and account management to ensure seamless financial operations.

Our staff are cross-trained and have experience in multiple areas to ensure flexibility and that all deadlines are met. For example, a designer working on graphics for a TV ad can also create digital media assets, ensuring a streamlined and cohesive campaign across platforms.

4.4.1.2 Personnel Approval and Flexibility

IAM fully understands the Lottery's right to approve or reject the personnel assigned to its account. We are committed to providing a team that meets the Lottery's expectations and, if necessary, will make adjustments to staff assignments as required.

Throughout the contract, the Lottery will maintain the right to request changes to any personnel involved in its projects. We ensure that all staff working on the Lottery account are fully qualified for their roles and capable of delivering excellent results.

4.4.1.3 Dedicated Account Management and Services

IAM is committed to providing dedicated account management services. Our account management team, led by **Jim Matuga** and **Dylan Sheldon**, ensures direct communication between the Lottery and IAM's internal teams. This allows for seamless collaboration and ensures that all deliverables, deadlines, and client needs are met with the highest degree of professionalism.

In addition to account management, IAM will provide:

- **Creative Direction:** Ensuring all campaigns are aligned with the Lottery's brand and objectives.
- **Creative Talent:** Our in-house creative team will develop custom content for all media platforms.
- **Production Expertise:** IAM's production team will oversee all aspects of campaign production, from initial concept to final execution, ensuring high-quality results.

4.4.1.4 Promotional Campaign Development and Execution

IAM's team is highly experienced in developing and executing promotional campaigns. We will assist the Lottery in securing and implementing advertising and promotional activities, including but not limited to:

- **TV, Radio, and Out-of-Home Advertising:** We have a deep understanding of the West Virginia market and will secure prime placements for Lottery promotions.
- **Supplemental Events and Promotions:** Our team will manage events, sponsorship activations, and special promotional activities as requested by the Lottery.
- **Promotional Prizes and Retailer Promotions:** IAM will develop and manage prize-based promotions, as well as design and distribute promotional materials to Lottery retailers.
- **Field Event Promotional Vehicles:** Our team has experience coordinating promotional vehicles and on-site activations to drive engagement with Lottery products.

IAM will also provide comprehensive reporting on all promotional activities, ensuring the Lottery has full visibility into the performance of each campaign.

4.4.1.5 Subcontractor Management

IAM has a network of trusted subcontractors for specialized services, including:

- **Promotional Software:** Our subcontractors specialize in developing custom software solutions for promotional campaigns, ensuring seamless integration with the Lottery's existing systems.
- **Event Services:** We work with vendors to supply event management services, from logistical support to on-site activation.
- **Graphic and Multimedia Design:** While IAM handles most design in-house, we collaborate with external partners for large-scale projects that require additional resources.

All subcontractor relationships will be managed with full transparency, and the Lottery will have final approval of all vendors involved in the project.

4.4.1.6 Performance Standards

IAM will work with the Lottery to establish a clear schedule of performance for all deliverables. Our internal project management system ensures that all deadlines are met, and we will provide regular updates to the Lottery throughout the contract.

- **Performance Schedule:** IAM will collaborate with the Lottery to create a detailed timeline for each campaign or promotional activity, ensuring all deliverables are completed on time.
 - **Release Orders:** IAM will perform in accordance with release orders issued by the Lottery, ensuring prompt and accurate delivery of all services.
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4.4.1.7 Authorization and Billing Procedures

IAM will ensure that all work performed is pre-approved by the Lottery Advertising Manager or Marketing Deputy Director. No work will be initiated without prior written authorization from the Lottery, and any unauthorized work will not be billed. This ensures full transparency and accountability in all our billing practices.

4.4.1.8 Budget Management

IAM is committed to managing the Lottery's advertising and promotions budget with full transparency. We will not exceed the approved budget unless changes are requested by the

Lottery and mutually agreed upon in writing. Our detailed budgeting and billing process will provide the Lottery with clear insight into all expenditures and allow for precise financial tracking.

4.4.2 Billing and Payments

4.4.2.1 Hourly Rate

IAM will adhere to the hourly rate proposed on the Pricing Page (Exhibit A), which includes all Contract Services performed and accepted by the Lottery. Our invoices will be structured to reflect categorized hourly rates for services rendered, ensuring full transparency and clarity. Each service will be documented and categorized according to the agreed-upon hourly rate to maintain clear communication and financial management.

4.4.2.2 Hourly Rate Inclusions and Increments

The hourly rate provided by IAM includes all costs required to meet the requirements of this RFP, except for third-party commodities and services. Billing will be done in 15-minute increments and submitted monthly. Our hourly rate is comprehensive, covering any incidental charges and overhead expenses associated with the routine conduct of business, ensuring that the Lottery receives a clear and predictable invoice.

4.4.2.3 Incidental Charges

All incidental charges, such as telecommunications, postage, and copying fees, are included in IAM's hourly rate. There will be no additional invoicing for these routine business expenses. This ensures that IAM's billing structure remains simple, clear, and easy for the Lottery to manage. This approach eliminates the need for micro-management of incidental expenses, ensuring a smooth operational process.

4.4.2.4 Overhead Expenses

IAM's hourly rate includes all overhead expenses, such as rent, utilities, insurance, and other operational costs. This means the Lottery will not be billed for these expenses separately. This structure allows the Lottery to benefit from a clear and simple financial relationship with no unexpected costs related to overhead.

4.4.2.5 Travel Expenses

Travel expenses related to attending conferences, special promotions, marketing meetings, and media events are also included in the hourly rate. IAM will not bill the Lottery for travel time between our office and the Lottery's headquarters, ensuring there are no hidden costs or additional travel-related expenses. The Lottery will only be responsible for travel expenses directly related to conference fees, as specified.

4.4.2.6 Third-Party Commodities and Services

IAM will pass the cost of third-party commodities and services directly to the Lottery at net cost, with no additional markup. This includes media placements and any third-party services required for campaigns. The Lottery will only pay the exact amount incurred by IAM from the third-party vendor, ensuring full transparency and cost-effectiveness.

4.4.3 Reimbursement to Vendor

4.4.3.1 Invoice Submission and Frequency

IAM will submit invoices to the Lottery twice per month, or as agreed upon during contract negotiations, ensuring timely reimbursement for services rendered. Each invoice will include detailed descriptions of services provided, categorized by hourly rate, as well as any third-party provider costs. All invoices will reflect net costs, with no markups.

4.4.3.1.1 Non-Billable Activities

IAM will not bill the Lottery for activities that are not directly related to project delivery. This includes:

- Processing of vendor invoices
 - Proofing by more than two IAM personnel
 - Reviewing third-party analysis or reports by more than two IAM personnel
 - Reviewing Lottery-provided documents for training purposes This ensures that the Lottery is only billed for work that directly contributes to the success of the campaign.
-

4.4.3.2 Reimbursement for Paid Invoices

IAM will submit reimbursements for invoices paid to third-party vendors twice a month, as per the agreement determined between IAM and the Lottery upon contract award. All reimbursement requests will reflect net costs, with no markups, and will be processed based on the actual costs incurred by IAM for services provided by outside entities.

To ensure accuracy, IAM will provide:

- Proof of payment for all third-party invoices (e.g., cleared checks or financial records)
 - Invoices showing the net cost paid by IAM to third-party providers This approach ensures that the Lottery only reimburses actual costs, with no hidden fees or additional charges.
-

4.4.3.3 Invoice Format and Documentation

IAM will work closely with the Lottery's financial staff to ensure invoices are submitted in the required format. Each invoice will provide a detailed breakdown of hours worked by each IAM team member, along with copies of third-party provider invoices and proof of payment (such as cleared checks). We will also accommodate any future changes to invoicing formats as mandated by the State Auditor's Office or other state authorities.

4.4.3.4 Proof of Payment for Third-Party Invoices

IAM will provide proof of payment for all third-party invoices associated with production services or materials provided for the Lottery. This proof will be included in the monthly invoices and made available to the Lottery for audits, ensuring financial transparency and compliance.

4.4.3.5 Invoice Requests

IAM understands invoice requests may come outside of normal billing.

4.4.3.6 Markup Restrictions

There will be no additional markup on third-party services or media purchases beyond what is submitted on the Pricing Page (Exhibit A). This ensures that the Lottery only pays for actual costs incurred by IAM, without hidden fees or charges.

4.4.3.7 Progress Payments

For larger projects, the Lottery may opt to make progress payments based on the percentage of work completed. IAM will identify key points in the work plan where progress can be measured and compensation becomes appropriate. This approach provides flexibility for the Lottery and allows for continuous project tracking and timely payments.

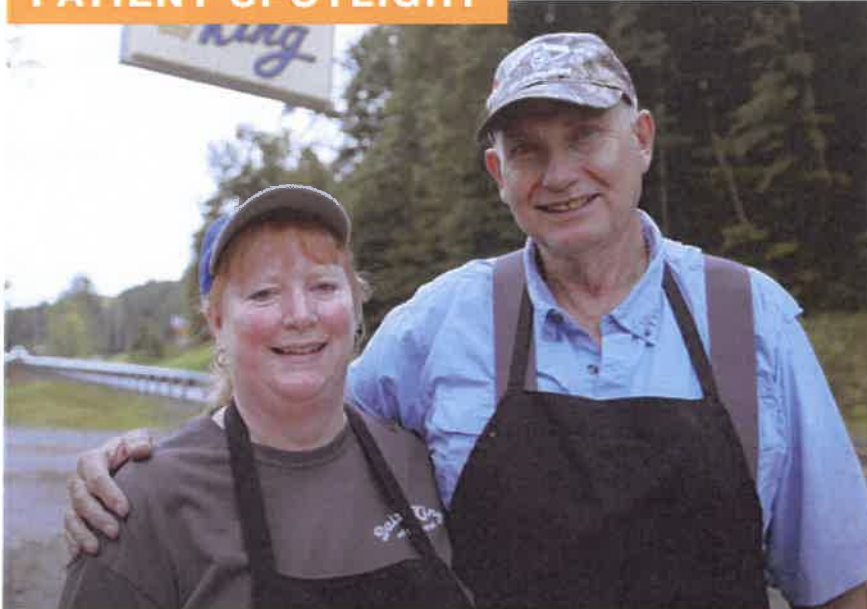
4.4.4 Liquidated Damages

IAM understands that failure to meet contract requirements can result in liquidated damages, as per West Virginia State Code §5A-3-4(a)(8). We are committed to delivering all services within the agreed-upon timelines and to maintaining high standards of performance throughout the contract to avoid any such penalties.

Exhibit A

Creative

PATIENT SPOTLIGHT



George Jenkins *Phillipi, West Virginia*

When George Jenkins started experiencing symptoms 10 years ago, he was referred to Dr. Vinay Badhwar, and as George puts it: "...*Miracles happened.*"

Our unique team of cardiologists and surgeons collaborate to develop a personalized treatment plan that will stop atrial fibrillation and ultimately cure it forever. In George's case, a robotic Cox-Maze procedure was recommended.

After successful treatment, George is back in Phillipi serving ice cream at his family-owned shop, just as he has been for the last 24 years.



Learn more about George's story and watch the testimonial at [WVUMedicine.org/AFIB](https://www.wvu.edu/medicine/AFIB)

Logo Variations



Horizontal



Vertical



Icon



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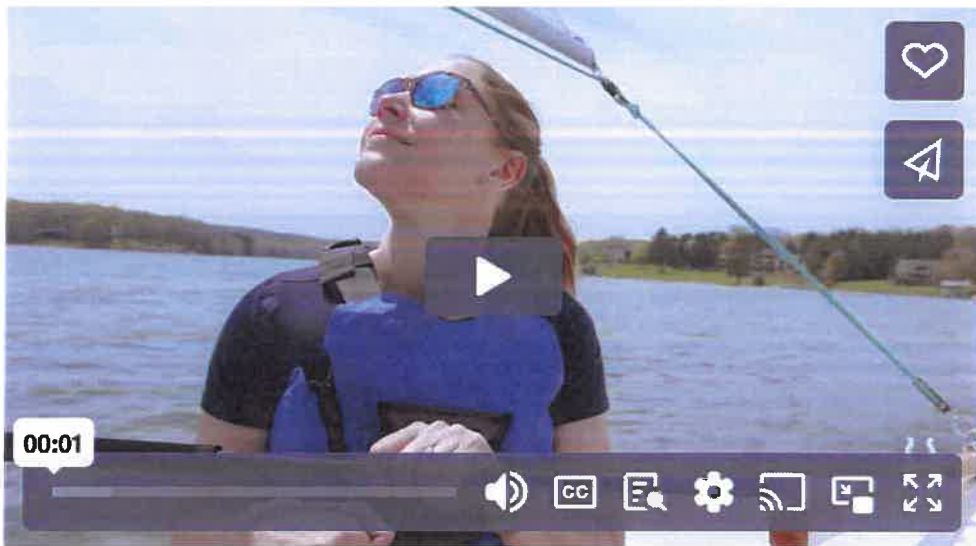
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United in Service. Committed to You.

At The United Federal Credit Union, we believe in putting our members first. As a member-owned, non-profit financial institution, we invest in you and the communities we serve. From offering competitive rates on loans and investments to actively supporting local causes, our commitment is to the well-being of our members and their neighborhoods.

[How we can serve you?](#)





You have what it takes to
Make it. In the mountains.



Exhibit B - Signature Page and Addendum

DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

(Printed Name and Title) Brian Jarvis, Vice-President
(Address) 1440 Center Hill Ave., Suite 4, Morgantown, WV 26505
(Phone Number) / (Fax Number) 3049932272
(email address) brian@inneractionmedia.com

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that: I have reviewed this Solicitation/Contract in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation/Contract for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that this bid or offer was made without prior understanding, agreement, or connection with any entity submitting a bid or offer for the same material, supplies, equipment or services; that this bid or offer is in all respects fair and without collusion or fraud; that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; that I am authorized by the Vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on Vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.

InnerAction Media, LLC

(Company) 

(Signature of Authorized Representative)
Brian Jarvis, VP, 9/30/2024

(Printed Name and Title of Authorized Representative) (Date)
3049932272

(Phone Number) (Fax Number)
brian@inneractionmedia.com

(Email Address)

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFP LOT25*01

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

- | | |
|--|--|
| <input checked="" type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input checked="" type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
| <input checked="" type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8 |
| <input type="checkbox"/> Addendum No. 4 | <input type="checkbox"/> Addendum No. 9 |
| <input type="checkbox"/> Addendum No. 5 | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

InnerAction Media, LLC

Company



Authorized Signature

10/4/2024

Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.

Revised 6/8/2012