

TEXAS LOTTERY COMMISSION

Request For Proposals

For

Advertising Media Services

No: 362-2023-0002

Response from:



ALETHEIA

MARKETING & MEDIA

October 28, 2022

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Letter of Transmittal



LETTER OF TRANSMITTAL

Roxanne Koltermann CTCD, CTCM
Contracts Coordinator
George H.W. Bush State Office Building
Texas Lottery Commission
1801 N. Congress Avenue
Austin, TX 78701

Dear Roxanne Koltermann,

Aletheia Marketing & Media, LLC is pleased to submit our proposal to the Texas Lottery Commission for Advertising Media Services as detailed in RFP No. 362-2023-0002. We are excited to share our media experience, capabilities, points of difference and initial recommendations.

As you will find in our response, we have the full complement of research, planning, buying, monitoring, and reporting. This includes what the Texas Lottery should expect from a media partner, but we go further with our proprietary insight's tools with Zenzi, a values-based marketing approach that combines data science and psychology to uncover motivations and "truths" that will influence our response.

Further, we have partnered with the Ward Group, LMG Media and RLM Agency to provide a group of comprehensive media partners that best provide audience relevance in today's dynamic marketplace, recognizing that we work, and play in Texas, a minority-majority State.

Please accept this letter and the attached Proposal as our sincere commitment to exceed the appropriate high expectations of professionalism, excellence, and ethical standards that are consistent with the Texas Lottery Commission. Aletheia Marketing & Media, LLC and our proposed partners have read, understood, and will comply with the Terms and Conditions as detailed in Parts 1, and Parts 2 of this RFP. Please note that Aletheia Marketing & Media, LLC also accepts the terms and conditions set forth in Part 3, with the exception that it requests that it be able to place media based on sequential liability (which is normal practice in the industry), where the Texas Lottery has specifically authorized such expenditures in writing. We will work with you for the finalization of the language but would propose the following language be added to Section 3.7 pertinent to sequential liability: "Notwithstanding the foregoing, Successful Proposer is authorized to act as the Texas Lottery's agent regarding the purchase of media and services hereunder where such purchases have been approved by the Texas Lottery in writing. Successful Proposers may contract based on sequential liability with such media and vendors."

Consistent with the documents read in the RFP documents, this proposal is valid for one hundred and eighty (180) days beginning November 1, 2022. Should you have any questions please feel free to contact me.

We are confident that in the proposal details the takeaways will include our integrity, resourcefulness, planning creativity and relevance, accountability, and responsiveness, and performance delivery.

Sincerely,

A handwritten signature in black ink, appearing to read 'Chris Schembri', with a long horizontal flourish extending to the right.

Chris Schembri, Founder and CEO
Aletheia Marketing & Media, LLC
Office: 972.776.4070
Mobile : 817.917.4213
Email : Cschembri@aletheia.com
14175 Proton Road
Dallas, TX 75244

Executive Summary



EXECUTIVE SUMMARY

Aletheia Marketing & Media and our partners fully understand the requirements of the RFP and commit to delivering all the goods and services through our combined resources outlined in Section 4 and the HUB Subcontracting plan of Section 5.

Our commitment includes the benefits the Texas Lottery Commission will receive by targeted consumer engagement through our planning, buying, and reporting capabilities. But moreover, and consistent with the expected high standards of adherence, execution, and ethics, we should start with our philosophy.

When we started the agency, we wanted to select a name that best represents our beliefs and our behaviors. Aletheia is the goddess of truth, and we have built the agency on the principles of truth, trust, and transparency. We seek the truth of the market, the customer, and the media we use to promote Texas Lottery® games and enhance awareness of the mission of the Texas Lottery to generate revenue for the State's designated beneficiaries including Texas public education and veterans.

Our proposed resource solution combines Aletheia's state-of-the-art tools, and our proprietary insights and our subcontractor partners to over deliver in dynamic motivations, not just static data sets. Beyond the numbers to develop effective customized media plans, we have a combination of in-house experts and HUB partners that will exceed the stated 24.30% participation goal. The details will be found in our HUB SUBCONTRACTING PLAN.

We believe we are professionally qualified to partner with the Texas Lottery Commission, as our people, our process, and our case studies will demonstrate, in summary:

Our people – we have a diverse group of teammates that have the media expertise, both with marketing and advertising roles. Our Aletheia Texas Lottery Team will include senior leadership that will be involved in the strategic level, the day to day, and reporting needs that this opportunity recommends.

Our process – in addition to the traditional planning and insights approach “The truth method”, we also can provide values-based motivations to understand consumer motivations and how that also informs media recommendations. Our scope of work for other like sized clients has included solutions that zoom into a hyperlocal geography all the way through to a national level. Our media strategies are developed with a balance of data and analytics to ensure that we are meeting the revenue and branding goals of our clients. We take pride in understanding the diversity that makes up the majority minority population here in the great state of Texas. Our process includes detailed work for the utmost accountability from plans, to buys, to reconciliations and dashboards. The Texas Lottery Commission will know Aletheia will be the responsible stewards you can trust.

Our recommendations – based on the initial work, but prior to client collaboration, we have included in the response a comprehensive media plan. We will prioritize market and audience allocation of media resources to deliver the highest return on advertising investments. As you will

find, our plan utilizes the right balance of digital and traditional channels, with ongoing optimizations to deliver the performance you should expect from your media partner.

Our case studies – we will share examples of work and performance to demonstrate how we work and the results that our clients gained from the partnerships.

Our Subcontracting partners – we will exceed the HUB participation goal with the following partners:

- Media buying and stewardship will include a partnership with The Ward Group, and LMG Media
- Multi-Cultural Media planning will include a partnership with RLM Media

SECTION BY SECTION RESPONSES





4. REQUIRED INFORMATION

4.1. Experience of Proposer

4.1.1. Each Proposer should state why it believes it has the required experience to provide the goods and services required under this RFP. Proposers must demonstrate an understanding of Texas as a minority-majority state as well as the ability to effectively reach and speak to all Texans (ages 18+).

We have read, understood, and will comply with Part 4.1.1 of the RFP. Please find our response to Section 4.1.1. on the following pages.

Aletheia Marketing & Media, we have the experience required as an Agency of Record, and our combined professional background that encompasses leadership roles at some of the largest agencies in Texas, largest marketing companies in Texas, and largest media companies in Texas. Our capabilities today include programmatic video, audio, display, search, social media, broadcast, out of home and print planning, buying, reporting and analysis. We have invested in the latest tools and proprietary research assets to bring our clients the “best, right” insights to optimize media investments.

The Agency, our subcontracting partners and our teammates have a diverse background and the client media work such as On the Border and GRIFOLS Biomat will address the desire for an understanding of Texas as a minority-majority state as well as the ability to effectively reach and speak to all Texans (ages 18+). We will provide additional information regarding staffing in Section 6.

4.1.2. Each Proposer shall provide descriptions for all engagements of comparable complexity and sensitivity to the requirements of this RFP that have been conducted within the past five (5) years. The description of comparable engagements shall be detailed and cover the contracts the Proposer and any subcontractors have had and all experience similar to this Contract which qualifies the Proposer to meet the requirements of this Contract, including but not limited to:

- a. Size of contract (including value).
- b. Reason for contract termination/expiration, if contract is no longer in effect.
- c. Types of services directly provided by the Proposer and whether the Proposer was the contractor or subcontractor.
- d. Term and type of contract, including effective dates.
- e. Any problems encountered.

We have read, understood, and will comply. Please find our response to Section 4.1.2. on the following pages.

A few of the engagements Aletheia Marketing & Media that are comparable to the complexity and sensitivity to the requirements of this RFP over the past five years include:

GRIFOLS BIOMAT

\$16 MM

Contract still in effect

Strategic media planning, buying, stewardship, reporting and analytics across all media channels. CONTRACTOR Texas markets included

June 2020, renews annually

No problems encountered

ON THE BORDER

\$3-4MM

Contract still in effect

Strategic media planning, buying, stewardship, reporting and analytics across all media channels. CONTRACTOR Texas markets included

June 2019, renews annually

No problems encountered

MAIN EVENT

\$6-7MM

New management team changed direction

Strategic media planning, buying, stewardship, reporting and analytics across all media channels. CONTRACTOR Texas markets included

January 2018-September 2019

No problems with service encountered, new team changed direction and partners

4.1.3. The Proposer shall state whether or not any of the following have occurred during the last five (5) years:

- a. The Proposer has had a contract terminated, and, if so, shall provide full details, including the other party's name, address, and telephone number.
- b. The Proposer has been assessed for any penalties or liquidated damages under any existing or past contracts, and, if so, note the reason for and the amount of the penalty or liquidated damages for each incident.
- c. The Proposer was the subject of (i) any disciplinary action for substandard work and unethical practices or (ii) any order, judgment, or decree of any federal or state authority barring, suspending or otherwise limiting the right of the Proposer to engage in any business, practice, or activity.
- d. The Proposer has been involved in any litigation related to contract performance.

We have read, understood, and will comply. Please find our response to Section 4.1.3. below.

- a. **Aletheia Marketing & Media has had client loss(es) over the past 5 years:**

**Krystal Hamburger ended the relationship because of a company sale post-bankruptcy. Angela Johnson, 1455 Lincoln Pkwy, Ste. 600, Dunwoody, GA, 30346
Phone: 770 351 4564**

Dickey's BBQ ended the relationship because the contract expired. Kristin Peterson, 4514 Cole Ave Ste 1015, Dallas, TX 75205 Phone: 972 248 9899

**Main Event ended the relationship because of a change in marketing leadership and strategy. Sarah Beddoe, 5445 Legacy Drive, Ste. 400, Plano, TX 75024
Phone: 432 557 5070**

b. Proposer HAS NOT been assessed any penalties or liquidated damages under any existing or past contracts.

c. Proposer HAS NOT been the subject of (i) any disciplinary action for substandard work and unethical practices or (ii) any order, judgement, or decree of any federal or state authority barring, suspending or otherwise limiting the right of the Proposer to engage in any business, practice, or activity.

d. Proposer HAS NOT been involved in any litigation related to contract performance.

4.2. Proposer References

A minimum of seven (7) verifiable references must be provided that include the contact person, name of company, phone, e-mail address and descriptions of services provided. Proposers' references shall include references for which the Proposer has provided similar services as described in Parts 7 and 8 of this RFP within the last five (5) years. The Texas Lottery reserves the right to verify all information in the Proposal submitted by the Proposer and seek other information it deems necessary to conduct a thorough review.

We have read, understood, and will comply.

We are pleased to share the following references as a combined offering, including our HUB subcontractors that include:

Texas Lottery References
Contractor – Aletheia Marketing & Media – Media AOR – Planning, Buying, Reporting & Analytics Edith Ann Ramey Chief Marketing Officer On The Border Edithann.ramey@ontheborder.com 214 536 0090
Contractor – Aletheia Marketing & Media – Media AOR – Planning, Buying, Reporting & Analytics Ryan McCoy Co-Founder Just Like Home Recipes LLC brandi@jlhrecipes.com 214 316 9495

**Contractor – Aletheia Marketing & Media – Media AOR – Planning, Buying, Reporting & Analytics
Also, Former Client at Main Event**

Brenda Mauri

President

Rusty Taco

bmauri@inspirebrands.com

646 457 9070

SUB - RLM Media - Media AOR – Omnichannel Planning, Buying, Reporting & Analytics

Stephen Martin

Chief Experience Officer

Stephen.martin@myzinghealth.com

ZingHealth

[\(312\) 205-7948 ext. 161 \(Direct\)](tel:(312)205-7948)

SUB - The Ward Group - Media AOR – Planning, Buying, Reporting & Analytics

Kurt Baxter

VP of Marketing

Alliance Consumer Group

KBaxter@acgbrands.com

972-343-1197

SUB - LMG Media Services – Traditional & Digital Planning, Buying, Sponsorship Evaluations, Event Planning and Support.

VP of Public Relations, Image and Branding

Dallas Arboretum

tlendecker@dallasarboretum.org

214-515-6523 office

214-542-0620 cell

4.3. Contact Person

4.3.1. Each Proposer shall provide the name, address, telephone number, and email address of a person to contact concerning questions regarding its Proposal.

We have read, understood, and will comply with Part 4.3.1 of the RFP.

Chris Schembri, CEO

14175 Proton Road

Dallas, TX 75244

Office: 972.776.4073

Cell: 817.917.4213

4.3.2 Each Proposer shall provide the name, address, telephone number, and email address of a person to contact (if different than the person identified in Section 4.3.1) concerning the Contract.

We have read, understood, and will comply.

Chris Schembri will also be the person to contact concerning the Contract.

4.4. Conflict of Interest

4.4.1. The Proposer must disclose any actual, potential or perceived conflict of interest relative to the performance of the requirements of this RFP. The Proposer must disclose any personal or business relationship of (a) itself; (b) any of its principals, officers, directors, investors, owners, partners, and employees (collectively, Proposer Personnel); (c) any spouse, child, brother, sister, or parent residing as a member of the same household in the principal place of residence of any Proposer Personnel; (d) any affiliate; or (e) any Subcontractor with (1) any employee or representative of the Texas Lottery (including the Texas Lottery Executive Director and its commissioners) or (2) the Lottery's vendors with contracts over \$100,000. The list for all Texas Lottery® contracts over \$100,000, including major and prime contracts, is regularly updated at the following website link:

[https://www.texaslottery.com/export/sites/lottery/About_Us/Doing_Business_with_TLC/Contracts_Over_\\$100x000/](https://www.texaslottery.com/export/sites/lottery/About_Us/Doing_Business_with_TLC/Contracts_Over_$100x000/)

Failure to promptly disclose any such relationship may be a cause for disqualification of a Proposal.

We have read, understood, and will comply.

After a review of the listed entities on the link as of the time of this submission, there are no conflicts.

4.4.2. This is a continuing disclosure requirement. The Successful Proposer shall disclose to the Texas Lottery in writing any actual, potential, or perceived conflict of interest, relative to the performance of the requirements of this RFP, both prior to Contract Award and after Contract Award, at the time the conflict is identified. Failure to promptly notify the Texas Lottery may be a cause for rejecting the Proposal, sanctioning the Successful Proposer, or exercising any other appropriate remedy under the Contract.

We have read, understood, and will comply.

4.5. Financial Soundness

4.5.1. Each Proposer must provide evidence of financial responsibility and stability for performance of the Contract and must demonstrate the ability to finance the project described in its submission.

We have read, understood, and will comply.

4.5.2. Each Proposer shall provide evidence of financial responsibility and stability based on any and/or all of the following:

1. If the Proposer is the sole source of financial resources, the Proposer must submit financials showing the Proposer's ability to finance the project on its own with current resources.

2. If the Proposer is the subsidiary of a parent corporation and the parent corporation is providing financial resources or assurance, the parent corporation must complete Attachment B, and the Proposer must submit financials for both the Proposer and the parent.

3. If the Proposer is a joint venture or a group of affiliated companies, the Proposal must include financials for each member or affiliate of such joint venture or group, as applicable.

If 1, 2 or 3 applies, then the Proposer shall submit the following documentation with its Proposal:

(a) Copies of audited financial statements and/or complete tax returns for each of the Proposer's (and its parent corporation, if applicable, or joint venture member or affiliate, if applicable) two (2) most recently ended fiscal years; and/or

(b) If documentation under (a) is not available, the Proposer shall provide other proof of financial assurance.

4. If the Proposer is relying on financial resources other than items 1 through 3 above, then the Proposer shall submit the following documentation with its Proposal:

(a) Other proof of financial assurance that is verified by a third-party financial institution. Examples of such items are as follows:

I. Unaudited financial statements accompanied by a line of credit from a third-party financial institution stating the credit amount and available balance.

II. Unaudited financial statements accompanied by a bank statement provided by a third-party financial institution confirming the Proposer's average bank balance for at least the previous six (6) months.

III. Any other financial information Proposer would like to be considered.

We have read, understood, and will comply. Under the Texas Public Information Act Sections 552.104, we claim the response to this section as confidential.

4.5.3. If the information in Section 4.5.2 is not available at the time of submission, the Proposer shall provide other proof of financial responsibility acceptable to the Texas Lottery prior to the deadline for submission of Proposals.

We have read, understood, and will comply.

4.5.4. The Texas Lottery reserves the right to require any additional information necessary to determine the financial responsibility and stability of the Proposer.

We have read, understood, and will comply.

4.5.5. The Proposal must include a certification that the Proposer will notify the Texas Lottery of a change in financial condition during the Contract term and any renewal thereof. If a Proposer experiences a substantial change in its financial condition prior to the award of the Contract, or if the Successful Proposer experiences a substantial change in its financial condition during the term of the Contract or any extension thereof, the Texas Lottery must be notified of the change in writing at the time the change occurs or is identified. Failure to notify the Texas Lottery of such a substantial change in financial condition will be sufficient grounds for rejecting the Proposal or terminating the Contract. For the purposes of this section, examples of a substantial change in financial condition are events such as insolvency, bankruptcy, or receivership.

We have read, understood, and will comply. We will notify the Texas Lottery of any change in our financial conditions should one arise.

4.6. Background Investigations

4.6.1. **Vendor Background Investigation.** Under Tex. Gov't Code §466.103, the Executive Director of the Texas Lottery is prohibited from awarding a contract for goods or services related to lottery operations to a person or legal entity who would not qualify for a sales agent license under the requirements of Tex. Gov't Code §466.155.

The Texas Lottery Commission may initiate investigations into the backgrounds of (a) any Apparent Successful Proposer; (b) any of the Apparent Successful Proposer's officers, directors, investors, owners, partners and other principals, as more particularly described in Tex. Gov't Code §466.155 (collectively, Apparent Successful Proposer Principals); (c) any of the Apparent Successful Proposer's employees; (d) any of the Apparent Successful Proposer's Subcontractors, or the Subcontractors' officers, directors, investors, owners, partners, principals or employees (collectively, Subcontractor Personnel); or (e) any other associates of the Apparent Successful Proposer it deems appropriate. The Texas Lottery Commission may also request background information for a spouse, child, brother, sister or parent residing as a member of the same household in the principal place of residence of the Apparent Successful Proposer, any Apparent Successful Proposer Principals, or Apparent Successful Proposer employees described above. Such background investigations may include fingerprint identification by the Texas Department of Public Safety and the Federal Bureau of Investigation, and any other law enforcement agency.

The Apparent Successful Proposer shall be obligated to provide such information about any Apparent Successful Proposer Principals, Apparent Successful Proposer employees, and Subcontractor Personnel as the Texas Lottery may prescribe. The Apparent Successful Proposer also agrees that the Texas Lottery may conduct background investigations of such persons. The Texas Lottery may reject a Proposal and/or terminate the Contract based solely upon the Apparent Successful Proposer's failure to provide information to complete a background investigation or the results of these background investigations.

We have read, understood, and will comply.

4.6.2. Contractually Defined Vendor Principal(s) Background Investigation. The Texas Lottery may initiate background investigations on the Apparent Successful Proposer Principals who will be directly involved in selling or leasing the goods or performing the services that are the subject of this RFP or the Contract. This includes any oversight function performed by such individuals. For purposes of this section and the attachments, these individuals are called “contractually defined vendor principals.”

We have read, understood, and will comply.

4.6.3. Vendor Employee Background Investigations. The Successful Proposer agrees that, during the term of the Contract and any extension thereof, it shall be obligated to provide such information about any principals, employees, and Subcontractor Personnel as the Texas Lottery may prescribe. The Successful Proposer also agrees that the Texas Lottery may conduct background investigations of such persons.

The Texas Lottery will conduct vendor employee background investigations on any of the Successful Proposer’s principals, employees, and Subcontractor Personnel who meet one (1) or more of the following criteria:

- they perform services that may impact the security and integrity of the core gaming business as determined by the Texas Lottery;
- they provide audit, financial, legal, or compliance services;
- they provide goods and/or services that control or monitor access to lottery premises;
- they have unescorted access to TLC facilities; and/or
- they have direct access to TLC information systems.

We have read, understood, and will comply.

4.6.4. Apparent Successful Proposer. If requested by the Texas Lottery, the Apparent Successful Proposer may be required to complete and return the following forms within ten (10) Working Days, or as otherwise directed by the Texas Lottery, after the written Announcement of the Apparent Successful Proposer is issued:

- a. Vendor Background Investigation Form (Attachment E).
- b. Certified List of Vendor Principals Form (Attachment E-1).
- c. Certified List of Contractually Defined Vendor Principals Form (Attachment E-2).
- d. Consent to Background Investigation and Release of Personal Information Form (Attachment E-4). A separate form shall be completed for each vendor principal included on *Attachment E-2 Certified List of Contractually Defined Vendor Principals Form* and each vendor/Subcontractor employee included on *Attachment E-3 Vendor Employee Background Investigation List*.
- e. Vendor Employee Background Investigation List (Attachment E-3).

We have read, understood, and will comply.

4.7. Disclosure of Interested Parties

Tex. Gov't Code §2252.908 states that a governmental entity or state agency may not enter into certain contracts with a business entity unless the business entity submits a disclosure of interested parties (Form 1295) to the governmental entity or state agency at the time the business entity submits the signed contract to the governmental entity or state agency. The Texas Ethics Commission has adopted rules requiring the business entity to file Form 1295 electronically with the Ethics Commission (See <https://www.ethics.state.tx.us/rules/commission/ch46.php>). If requested by the Texas Lottery, the Apparent Successful Proposer may be required to complete and file the Form 1295 with the Ethics Commission after the written Announcement of the Apparent Successful Proposer is issued and prior to contract execution.

We have read, understood, and will comply.

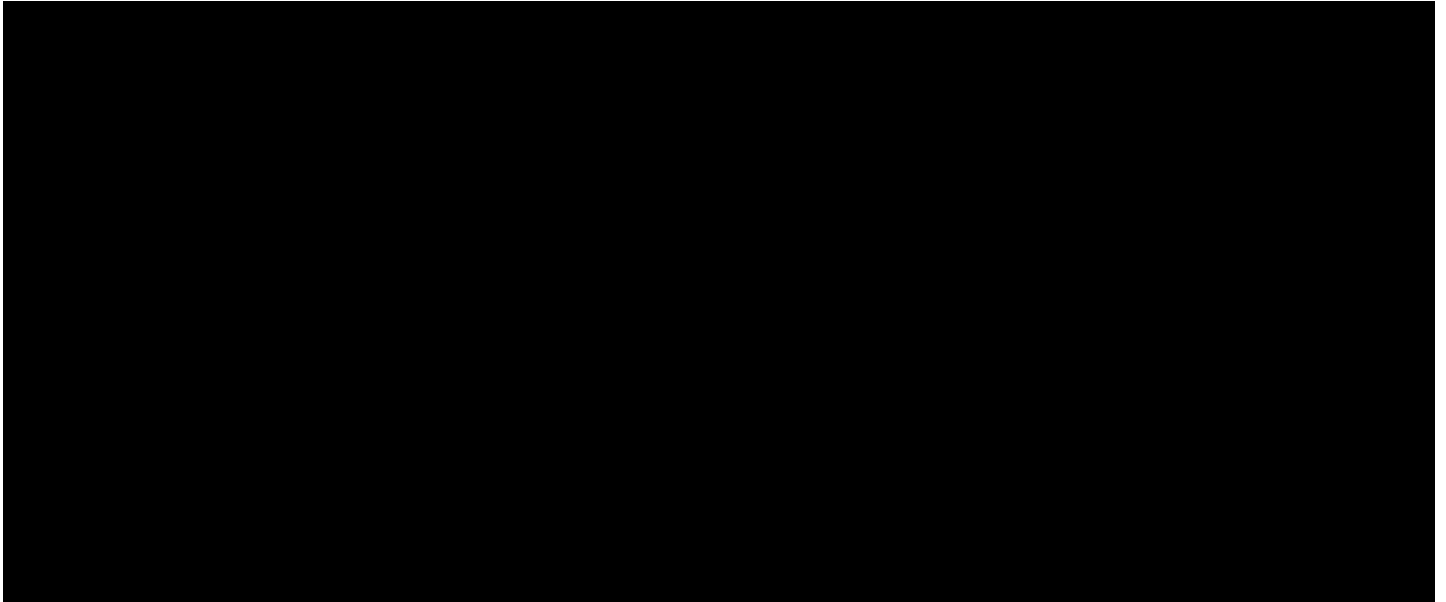


PRE-QUALIFICATION LETTER

Confidentiality Claimed
§552.110

October 25, 2022

To Whom It May Concern:



Sincerely,

A handwritten signature in blue ink, appearing to read 'Jay O'Jibway'.

Jay O'Jibway

316 Bailey Avenue, #107
Fort Worth, Texas 76107
NMLS ID #580162
Mobile: (817) 975-9110
Direct: (979) 413-7033



5. HISTORICALLY UNDERUTILIZED BUSINESS (HUB) PARTICIPATION

5.1. HUB Requirement

The Texas Lottery has adopted the rules promulgated by the Comptroller of Public Accounts (CPA) regarding Historically Underutilized Businesses (HUBs) in 34 Texas Administrative Code (TAC) §§ 20.281 – 20.298 (See [http://texreg.sos.state.tx.us/public/readtac\\$ext.ViewTAC?tac_view=5&ti=34&pt=1&ch=20&sch=D&div=1&rl=Y](http://texreg.sos.state.tx.us/public/readtac$ext.ViewTAC?tac_view=5&ti=34&pt=1&ch=20&sch=D&div=1&rl=Y)). By submitting a Proposal, the Proposer certifies that it has reviewed 34 TAC §§ 20.281 - 20.298. Rule 20.285 addresses the specific requirements of Historically Underutilized Business subcontracting plans (HSPs).

We have read, understood, and will comply.

5.2 HSP Submission and Texas Lottery Review

5.2.1. All proposals must include an HSP (Attachment C, including Method A or B, if applicable) in the format required by the CPA. Proposers may access the HSP forms on-line at the following CPA website link: <https://www.comptroller.texas.gov/purchasing/vendor/hub/forms.php>. The forms must be printed, signed and submitted with your Proposal. The HSP is a pass/fail requirement. PROPOSALS THAT DO NOT INCLUDE A COMPLETED HUB SUBCONTRACTING PLAN PREPARED IN ACCORDANCE WITH 34 TAC §20.285 SHALL BE REJECTED AND WILL NOT BE EVALUATED.

We have read, understood, and will comply.

5.2.2. The HSP form is provided in Attachment C of this RFP. To determine whether a Proposer has performed a good faith effort in preparing its HSP as required by the CPA's HUB rules, the Texas Lottery may request clarifications, if necessary. The HSP will be reviewed based on the Proposer's submission and any clarifications requested by the agency.

We have read, understood, and will comply.

5.3. Assistance for Preparation of HSP

5.3.1. *Pre-Proposal Conference.* Proposers are encouraged to attend the pre-Proposal conference, which will include a brief overview of the HSP requirements. Proposers may ask questions at the pre-Proposal conference regarding the HSP. A copy of the TLC's Pre-Bid/Proposal Conference Booklet regarding HSP requirements is available on the agency's website at:

http://www.txlottery.com/export/sites/lottery/About_Us/Doing_Business_with_TLC/Procurement/
Proposers should review the HSP booklet thoroughly to ensure they fill out and submit all forms correctly.

We have read, understood, and will comply.

5.3.2 *HSP Quick Check List and HUB Subcontracting Opportunity Notification Form.* Attached to this RFP are an HSP Quick Check List (Attachment C-1) prepared by the CPA and a HUB Subcontracting Opportunity Notification Form (Attachment C-2). Attachment C-1 is intended to assist Proposers in preparing the HSP forms but is not required to be submitted with Proposals. Proposers are encouraged to use Attachment C-2 when sending notice of subcontracting opportunities.

We have read, understood, and will comply.

5.3.3 *Additional TLC Assistance.* As stated above, if an HSP is rejected, the Proposal will be disqualified and will not be considered. **Therefore, Proposers are strongly encouraged to start preparing HSP forms as soon as possible and take advantage of the following TLC assistance. Please note there are deadlines associated with this process and Proposers have a limited amount of time to cure any deficiencies.**

- Written questions regarding the HSP can be submitted at any time up until the Proposal deadline. The TLC will compile and post a separate HSP question-and-answer document on the TLC website. The document will be updated as questions are submitted. It is the Proposer's responsibility to check the TLC website for this information.
- The TLC will conduct one-on-one HSP workshops with Proposers upon request. The workshops will cover detailed information on how to complete the HSP forms. Workshops must be concluded by the date and time listed in the Schedule of Events. Workshops due to gathering restrictions may be conducted via Zoom, TEAMS or telephone conference. Proposers are responsible for contacting the Texas Lottery to schedule a workshop during the specified time period. Proposers may schedule a workshop up until the final date listed in the Schedule of Events.
- The TLC will review and provide individual written feedback on draft HSP forms submitted by Proposers. Draft HSP forms must be submitted by the date and time listed in the Schedule of Events. Upon request, the TLC may also provide verbal feedback.

Note that "draft HSP forms" consist only of the forms included in Attachments C, C-1 and C-2 of the RFP and documentation related to performance of the good faith effort. In reviewing draft forms, the TLC will not comment on responses to any other sections of the RFP, even if they are referred to in the HSP forms. Proposers are instructed not to submit any other portions of their Proposal to the TLC as part of the draft HSP.

One-on-one workshops and the TLC's review of draft HSP forms do not guarantee that the HSP submitted with the Proposal will pass.

We have read, understood, and will comply.

5.4. Requirements for Completing the HSP Forms

5.4.1. TLC's HUB Participation Goal. The goods and/or services requested in this RFP are classified in the category of Other Services Contracts. The agency's HUB participation goal for this RFP is 24.30%.

We have read, understood, and will comply.

5.4.2. Requirements of the HUB subcontracting plan. Each Proposer shall complete the HSP forms prescribed by the CPA (Attachment C) and provide the following:

- a. a certification the Proposer has made a good faith effort to meet the requirements of 34 TAC § 20.285;
- b. the names of the subcontractors that will be used during the course of the Contract;
- c. the expected percentage of work to be subcontracted; and
- d. the approximate dollar value of that percentage of work.

Each Proposer shall provide all documentation required by the agency to demonstrate the Proposer's compliance with the good faith effort requirements prior to Contract Award. If a Proposer fails to provide supporting documentation (phone logs, fax transmittals, electronic mail, etc.) by the deadline specified by the agency, the Proposal shall be rejected for material failure to comply with Tex. Gov't Code §2161.252 (b).

We have read, understood, and will comply.

5.4.3. Proposer Intends to Subcontract

Proposers who intend to subcontract any portion of the Contract must indicate in the HSP form that they intend to subcontract, and must perform one of the three good faith effort methods identified below.

- **Method A (1): Using 100% HUB Subcontractors.** Proposer will use only Texas- certified HUBs for all identified subcontracting opportunities.
- **Method A (2): Meeting the Specified HUB Contract Goal.** Proposer will meet the HUB contract goal by using only Texas-certified HUBs with whom the Proposer has contracted for five years or less.
- **Method B: Good Faith Effort Outreach.** Proposer will perform good faith effort outreach for each identified subcontracting opportunity by contacting at least three Texas-certified HUBs and two trade organizations or development centers that serve members of the HUB

groups. **Proposers using this method must perform the outreach even for areas where a Proposer has a pre-existing subcontracting relationship.**

PROPOSERS WHO INTEND TO SUBCONTRACT, AT A MINIMUM, MUST USE ONE OF THE METHODS OUTLINED ABOVE. FAILURE TO DO SO WILL RESULT IN DISQUALIFICATION.

We have read, understood, and will comply.

5.4.4. Proposer Does Not Intend to Subcontract

Proposers who intend to fulfill the entire Contract using only their own existing resources and employees, without subcontracting, should check the appropriate box in Section 2 of the HSP form and complete Sections 3 and 4 of the form.

The Proposer must explain how all functions of the Contract will be performed without the use of Subcontractors and should refer to Section 3 of the HSP form.

We have read, understood, and will comply.

5.5. Subcontracting Opportunities

5.5.1. The Texas Lottery has identified the following potential subcontracting opportunities under this RFP. Proposers intending to subcontract any must perform the good faith effort detailed in the HSP instructions and include a compliant HSP with the Proposal.

CLASS 559: MASS TRANSPORTATION, RAIL VEHICLE PARTS AND ACCESSORIES

Item Numbers and Commodity Descriptions:

559-70 Signage: Destination, Routing and Advertising

CLASS 801: SIGNS, SIGN MATERIALS, SIGN MAKING EQUIPMENT, AND RELATED SUPPLIES

Item Numbers and Commodity Descriptions:

801-58 Signs: Billboard, Advertising, etc.

CLASS 915: COMMUNICATIONS AND MEDIA RELATED SERVICES

Item Numbers and Commodity Descriptions:

915-01 Advertising Agency Services
915-04 Advertising Services, Outdoor Billboard, etc.
915-10 Advertising, Digital
915-59 Mail Services, Express
915-71 Newspaper and Publication Advertising, Non-legal

CLASS 918: CONSULTING SERVICES

Item Numbers and Commodity Descriptions:

918-07 Advertising Consulting
918-76 Marketing Consulting

CLASS 920: DATA PROCESSING, COMPUTER, PROGRAMMING, AND SOFTWARE SERVICES

Item Numbers and Commodity Descriptions:

920-28 Emergency Back-up, Disaster Recovery Services and Facilities for Data Processing

CLASS 958: MANAGEMENT AND OPERATION SERVICES (NOT OTHERWISE CLASSIFIED)

Item Numbers and Commodity Descriptions:

958-84 Social Media Management Services

CLASS 961: MISCELLANEOUS SERVICES, NO. 1 (NOT OTHERWISE CLASSIFIED)

Item Numbers and Commodity Descriptions:

961-49 Legal Services, Attorneys
961-66 Sign Making and Painting Services

CLASS 962: MISCELLANEOUS SERVICES, NO. 2 (NOT OTHERWISE CLASSIFIED)

Item Numbers and Commodity Descriptions:

962-24 Courier/Delivery Services, Including Air Courier Services)
962-86 Transportation of Goods, Shipping and Handling, and Other Freight Services

CLASS 971: REAL PROPERTY RENTAL OR LEASE

Item Numbers and Commodity Descriptions:

971-70 Storage Space Rental or Lease

We have read, understood, and will comply.

5.5.2. The potential subcontracting opportunities listed above may or may not be areas that a Proposer would subcontract, depending on that Proposer's existing resources, employees, and business model. Further, Proposers are not limited to the list above, and may identify additional areas of subcontracting. Proposers who intend to subcontract are responsible for identifying all areas that will be subcontracted and shall submit a completed HSP demonstrating evidence of good faith effort in developing that plan.

We have read, understood, and will comply.

5.5.3. A list of HUB vendors registered with the CPA for the subcontracting opportunities identified above is included under the HUB/CMBL tab of this RFP. This list is provided as a resource to assist Proposers in preparing and submitting an HSP. The Texas Lottery Commission does not endorse, recommend or attest to the capabilities of any company or individual listed. Note that currently active certified HUBs will have a status code of "A." All other status codes indicate that a vendor is inactive or not a HUB.

We have read, understood, and will comply.

5.5.4. Please refer to the HUB/CMBL Directory Instructions and HUB Vendor Reference Lists under the HUB/CMBL tab of this RFP to locate potential HUB Subcontractors.

We have read, understood, and will comply.

5.6. Post-Contract Award

5.6.1. Notification of Subcontractors

Following Contract Award, the Successful Proposer must provide notice to all subcontractors (HUBs and Non-HUBs) of their selection for the awarded Contract. The Successful Proposer is also required to provide a copy of each notice to the agency's HUB Coordinator for the Contract no later than ten (10) Working Days after the Contract is awarded. Proposers should refer to Section 4 of the HSP form for additional information about this requirement.

We have read, understood, and will comply.

5.6.2. HSP Changes

Following Contract Award, any proposed changes to the HSP must be submitted, in writing, by the Successful Proposer to the Texas Lottery for prior review and must be approved by the Texas Lottery in writing before becoming effective under the Contract.

We have read, understood, and will comply.

5.6.3. HSP Reporting

Following Contract Award, if the Successful Proposer is subcontracting, the Successful Proposer shall maintain business records documenting compliance with the HSP and shall submit a monthly compliance report in the format required by the Texas Lottery. The monthly compliance report shall be submitted to the Texas Lottery by the 10th of the following month or on the date requested by the agency's HUB Coordinator or his/her designee. The submission of the monthly compliance report is required as a condition of payment

We have read, understood, and will comply.



6. ADVERTISING AGENCY STAFFING REQUIREMENTS

6.1. Ad Agency Staffing

6.1.1. It is crucial that the Successful Proposer and the team assigned to work on the Texas Lottery account demonstrate the experience and skills required to effectively reach and communicate with the diverse population of Texas.

We have read, understood, and will comply.

We are fortunate to have an experienced group of media strategists and specialists that make up our talented and diverse backgrounds. The resumes included under a separate tab in the response share the talent range and expertise the Texas Lottery should expect as part

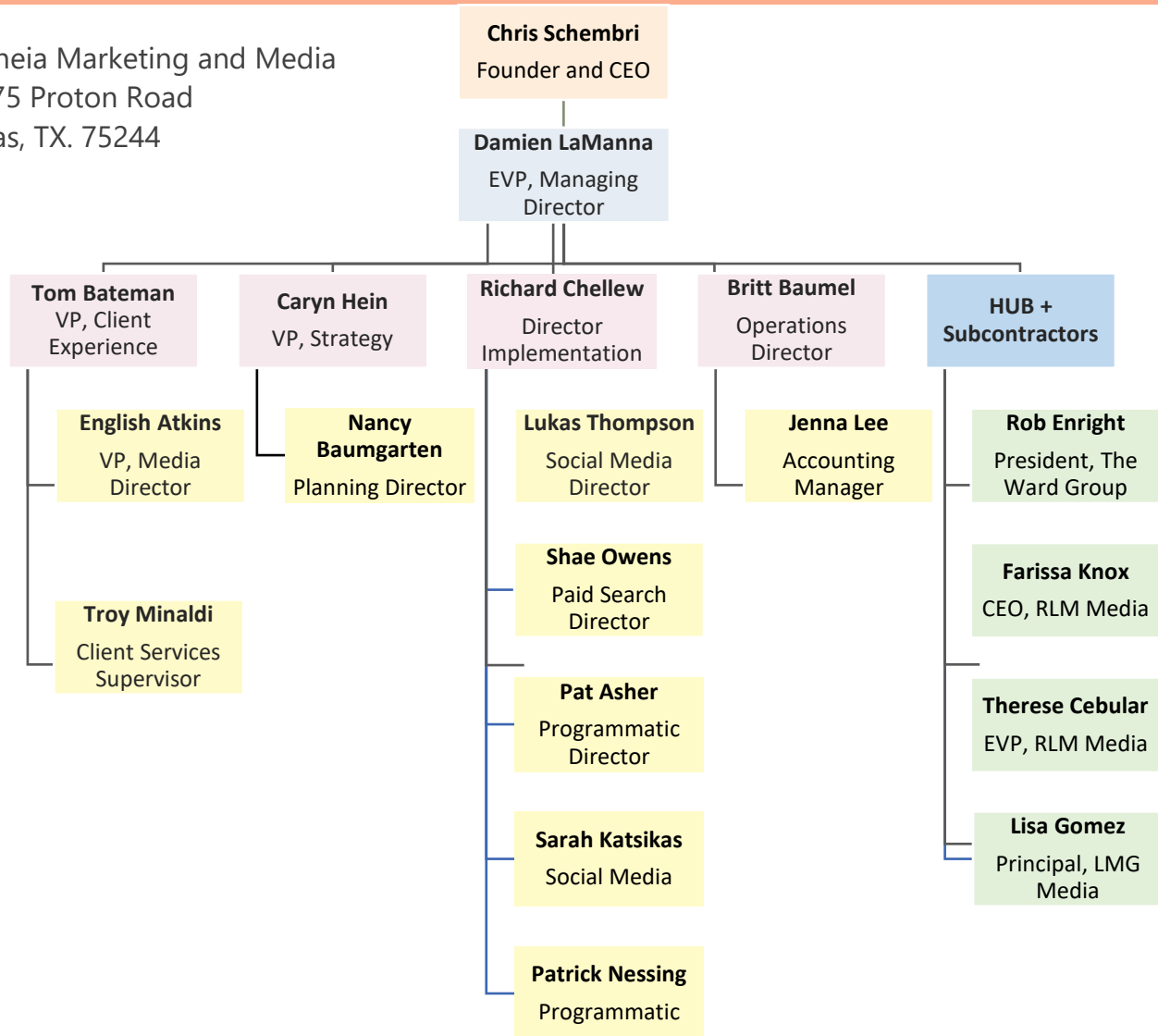
6.1.2 Proposers must provide an organizational chart which identifies all staff who will support the Texas Lottery account. The organizational chart should include the position titles, number of positions, and names of all personnel. The organizational chart should include corporate directors and/or officers who will provide direction or oversight to the Texas Lottery account.

We have read, understood, and will comply.

The organization chart provides the response to staffing plan and reflects full-time employees and part-time employees.

Aletheia Marketing & Media - TX Lottery Team Org Chart

Aletheia Marketing and Media
14175 Proton Road
Dallas, TX. 75244



6.2 Agency Staff Structure

6.2.1. Proposers must submit an in-depth staffing plan 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. 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.

We have read, understood, and will comply.

By way of the organization chart, and resumes, the Texas Lottery Commission will benefit from a combination of our hands on Senior Leadership team combined with our dedicated specialists across departments.

6.2.2. Proposers must provide a list of personnel to be assigned to the Texas Lottery account and include detailed resumes for all personnel, which include, at minimum name: title and job description; number of years of experience; description of current duties, and length of time spent doing present duties (or related) 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, understood, and will comply.

-Name -Title -Total Years' Experience -Total Tenure in Role	Job Description	-Current Duties -Time in current position -Accomplishments: (including SOW and client name)	Continuing Education
Chris Schembri Founder and CEO 30 years of experience 4 years in current role	Client Satisfaction: Ensure that our team is over delivering for each of our clients Media Strategist: Work with our planning team to deliver plans that are based on customer data, media research and performance analytics. Coach: Encourage our team members to do their best for our clients and for themselves.	Current Duties: Guide a team to deliver media solutions that drive revenue, awareness, and innovation on behalf of our clients. Time in current position: 4 years Accomplishments include parlaying the media roles at AT&T, Southwest Airlines and Discovery Networks into my own firm that builds informed media strategy, flawless execution, and reliable reporting and metrics. Onboarding a new client "Incredible Pizza Company" in less than 2 weeks, in multiple markets. and having a direct positive impact on overall sales (15% YOY increase).	Vistage Executive Leadership 4A's Advertising Association Participate in webinars that focus on innovative technology as it relates to media channels and the impact it can have on strategy.

<p>Damien LaManna EVP, Managing Director 19 years of experience 4 years in current role</p>	<p>Drive innovation across the Agency by ensuring we have access to best-in-class tools and resources, attract A-level talent, and have process and procedures in place to execute effective media campaigns.</p>	<p>Current Duties: Guide strategy for key high-level agency clients. Oversee the Executive Management Team inclusive of Implementation, Client Experience, and Business Intelligence. Spearhead New Business. Provide executive support to CEO.</p> <p>Time in Current Position: 4 years</p> <p>Accomplishments: Won Pollie Award for “Best Statewide Digital Media Campaign” with Louisiana Public Health Institute resulting in passage of legislation protecting Louisianans from second-hand smoke exposure in bars and restaurants across the state. (Louisiana Campaign for Tobacco Free Living, Morgan + Co., Media AOR 2011)</p> <p>One of Lead Digital Media Strategists on Healthcare.gov working on digital media campaigns with the U.S. Department of Health and Human Services and Centers for Medicare and Medicaid Services. Over 3 open enrollment periods, our work resulted in 22 million new enrollees signing up for protections under the Affordable Care Act. (Healthcare.gov, Weber Shandwick, AOR 2014-2016)</p>	<p>Vistage Executive Leadership Program</p> <p>Breakthrough Leadership Program</p> <p>Mirren Executive Leadership Summits</p> <p>Industry conferences and events (4A's, IAB, Path2Purchase, eMarketer)</p> <p>Daily/weekly review of industry trades and current news</p>
<p>Caryn Hein VP, Strategy 17 years of experience 1.2 years in current role</p>	<p>Own the communications strategy practice and approach across clients – includes bringing data-centric thinking to briefs and execution, driving consumer and cultural insight, and serving as the connective tissue between client and agency strategy</p> <p>Assess current and future agency research investments relative to client and agency needs, developing external relationships and ensuring resources reflect modern planning and technology requirements</p>	<p>Current Duties: Guide over-arching audience research, strategy formation and planning practice. Lead a team of planners and analysts and work directly with tactical channel leads to ensure activation aligns with planned strategies. Manage measurement and reporting to understand and quantify client success.</p> <p>Time in Current Position: 1.2 years</p> <p>Accomplishments: Spearheaded the television research practice within Mullen/Mediahub – established methodology and framework for reporting and measurement.</p> <p>Created targeting approach for tune-in planning at Mullen/Mediahub using Nielsen ratings data and PRIZM segmentation to craft a standard and repeatable method for lookalike analysis.</p> <p>Initiated and guided the development of a custom Business competitive data set for AT&T – resulting in the increased accuracy of reporting and providing internal client with their first ever detailed view of category activity across Enterprise and Small Business</p>	<p>Industry and client-relevant conferences and events (ex. 4As StratFest, Adobe Summit)</p> <p>Daily/weekly review of industry trades and current news (ex. AdExchanger, AdWeek, AdAge)</p>
<p>English Atkins VP, Media Director</p>	<p>Own the client relationship and media campaign</p>	<p>Current Duties: Lead team of Client Service Supervisors to schedule meetings; prepare</p>	<p>Breakthrough Leadership Course</p> <p>Mirren Direct webinars</p>

33 years of Media experience 4 years in current role	<p>management – includes maintaining meeting schedules and communication between Client and Agency, ensuring projects delivered on time and within budget</p> <p>Serve as conduit between all departments - maintaining cross-department relationships and communication, liaising with subject matter teams required for project deliverables</p>	<p>project status reports; send meeting recap notes; communicate plan timing, budgets, goals, KPIs and budget to all channel teams; review budget pacing and performance reporting; request and review all media billing; flowchart maintenance and actualization; ensure channel teams request and receive all creative assets</p> <p>Time in Current Position: 4 years</p> <p>Accomplishments: Led agency-wide migration to Microsoft Teams for Client Team communications and ClickUp for project management, successfully onboarded more than 20 new clients in the past 3 years with combined total net media budgets and billing of almost \$50MM</p>	Excel Campus courses General Assembly – Digital Marketing 101
Tom Bateman VP, Client Experience 32 years of advertising experience 1 year in current role	<p>Focused on client satisfaction to ensure retention and ultimately organic growth. Responsible for representing the client's best interest on the internal team while providing key strategic guidance. Lead a best-in-class team to help our clients achieve their goals.</p>	<p>Current Duties: Grow senior-level client relationships and serve as trusted strategic partner. Collaborate with Strategy and Business Intelligence team to ensure that the strategic plans align with client objectives and goals are being met. Work closely with Implementation and Client Management Team to consistently deliver best in class execution and superior client service.</p> <p>Time in Current Position: 6 months</p> <p>Accomplishments: Managed multi-million-dollar engagements with Fortune 50/100 clients. Drove the strategic development and implementation which produced the most successful brand campaign in history of BMW, achieving a 15% increase in total brand volume. Led the development of the 1st ever digital media plan for Louisville Slugger, which reversed several years of sales declines.</p>	<p>Vistage Executive Leadership Program</p> <p>Breakthrough Leadership Program</p> <p>Industry conferences and events (4A's, IAB, Path2Purchase, eMarketer)</p> <p>Daily/weekly review of industry trades and current news</p>
Richard Chellew VP, Implementation 23 years of advertising experience 2 years in current role	<p>Oversee and manage all media channel teams. Collaborate with other business units to ensure that client success. Provide thought leadership and develop agency processes.</p>	<p>Current Duties: Lead team of SMEs that encompass all marketing channels. Collaborate with SBI, Client Services to ensure end to end client success. Develop and implement agency processes to improve client performance, agency efficiencies and overall employee experience.</p> <p>Time in Current Position: 2 Years</p> <p>Accomplishments: Built IMA digital service portfolio from the ground up. Grew agency billings to \$100MM within 5 years through expanding existing client relationships and new account acquisition.</p>	<p>Breakthrough Leadership Program</p> <p>Industry conferences and events (4A's, IAB, Path2Purchase, eMarketer)</p> <p>Google Skillshop Certifications: Google Ads, Search, Display, Web Dev, Analytics, campaign manager, tag manager, mobile, shopping, video</p> <p>Adelphic & Basis certifications</p> <p>Daily/weekly review of industry trades and current news</p>

		<p>Worked with agency partner and Dickey's leadership team to grow digital sales from 6% of total sales to over 60% in less than a year.</p> <p>Designed, built and automated a system that identified and pulled high yield customers into an up-sell funnel that resulted in 20% increase in average revenue per user at J2 Global</p>	
<p>Nancy Baumgarten Strategy Director 38 years of experience 9 months in current role</p>	<p>Manages the day-to-day process of all media planning efforts for Clients of responsibility.</p> <ul style="list-style-type: none"> • Confers with Strategy Director, digital subject matter experts, Clients to establish media objectives, and strategies for advertising campaigns • Lead team in setting strategies for developing media plans. • Implements the management of daily tasks in support of the media product • Studies demographic data and consumer profiles to identify desired target audiences for print, broadcast, or online advertising • Evaluates composition of a wide range of media vehicles to determine which would most effectively reach the target audience • Gathers supporting statistics and prepares media plans with directives to guide the buying process. 	<p>Current Duties: Direct audience research, strategy formation and planning for a select group of clients.</p> <p>Time in Current Position: 9 months</p> <p>Accomplishments:</p> <p>Aletheia:</p> <ul style="list-style-type: none"> - Led strategy that increased enrollments for higher education client by 21% <p>Intertrend:</p> <ul style="list-style-type: none"> - Integrated and trained media staff on new software programs: MediaTools, GfK MRI, Nielsen Media Impact (NMI), and MediaOcean. - Planned successful Toyota media launch for largest new model launch of the year (Sienna/2021). - Developed new media spill methodology that was integrated across Toyota. <p>Levensen & Hill</p> <ul style="list-style-type: none"> - Established recruitment advertising program and analytics for second largest trucking company (Greatwide) in the United States. - Reduced cost-per-call from \$500 to \$13. - Negotiated +512% added value (free media) for Greatwide. - Responsible for management of client relationships with all clients including Shoney's Restaurants, Church's Chicken, and Bimbo/Marinela. - Managed department of seven. 	<p>Graduate Leadership Plano</p> <p>Industry and client-relevant conferences and events</p> <p>Daily/weekly review of industry trades and current news (ex. AdExchanger, AdWeek, AdAge)</p>
<p>Shae Owens Director of Search 7 years SEM/SEO 6 months in current role</p>	<p>Manage search strategy and buying for all clients. Manage team members and help/train new search trends</p> <p>Improving business processes & workflows to better enable collaboration & efficiency between account managers, and clients.</p>	<p>Leading paid search-related discussions with clients and internal meetings. Assisting sales team on audits, decks, and pitches for prospective paid search clients.</p>	<p>Google Certifications</p>
<p>Pat Asher Director Performance Media 31 years' experience in media</p>	<p>Manage Programmatic Media Channels along with Direct Partnership relationships and</p>	<p>Responsible for managing and training team members, building processes and procedures to run the department more</p>	<p>Adelphic & Basis certifications Google Certifications Facebook Blueprint</p>

2 years in current role	placements for all agency clients.	efficiently, and stay ahead of industry developments and trends.	Aletheia Academy
Lukas Thompson Director of Social Media 5 years of experience 2 years in current role	Manage paid social strategy and buying for all clients. Manage team members and help/train on social platforms. Responsible for QA and direct client communication	-February 2021 -Generated millions in revenue for clients in restaurant/CPG/retail categories. Managed budgets of over \$1MM per quarter for Enterprise level clients	Facebook Blueprint Aletheia Academy: Digital Media Module, Reporting Module, Strategy and Planning Module.
Sarah Katsikas Social Media Buyer 3 years of experience 6 months in current role	Manages the paid social media buying process, responsible for overall strategic buying recommendations, and manages the day-to-day execution of social campaigns	- Current duties include setting up, optimizing, and reporting on paid social campaigns. Meet with clients to review performance updates. Present clients with growth opportunities. - 6 Months in current position	Facebook Blueprint Aletheia Academy
Patrick Nessing Performance Media Buyer 2 years of experience 3 months in current role	Manages performance media buying process, responsible for overall strategic buying recommendations, and manages the day-to-day execution of client campaigns.	- Current duties include setting up, optimizing, and reporting on performance campaigns. Meet with clients to review performance updates. Present clients with growth opportunities. -3 Months in current position	Adelphic & Basis certifications Aletheia Academy
Britt Baumei Operations Director 24 years of advertising experience 3 years in current role	Manage all financial functions Supervise AR and AP Oversee employee benefits Create bi-monthly financial and managerial reports Conduct all office management duties	Current duties include invoicing clients, paying vendors, processing company payroll, onboarding new employees, creating financial reports, evaluating and implementing employee benefits, streamlining internal processes, and serving as a member of the company Leadership Team. In the position for 3 years. Accomplishments include managing budgets of up to \$80 million and being responsible for payroll and benefits of 30 employees	
Jenna Lee Accounting Manager 5 years of accounting experience 1 year in current role	Manage Accounts Receivable Reconcile all client accounts Create Financial Reports	Current duties include invoicing all clients on a monthly or bi-monthly basis; reconciling all clients on a monthly and quarterly basis; creating client statements on a monthly basis; collecting past due balances	National Association of Certified Public Bookkeepers
Troy Minaldi Client Services Supervisor 30 years of experience 1 year in current role	Manages client relationship and media campaign management – includes maintaining meeting schedules and communication between Client and Agency, ensuring projects delivered on time and within budget Serve as conduit between all departments - maintaining cross-department relationships and communication, liaising with subject matter teams required for project deliverables	Current Duties: Schedule meetings; prepare project status reports; send meeting recap notes; communicate plan timing, budgets, goals, KPIs and budget to all channel teams; review budget pacing and performance reporting; request and review all media billing; flowchart maintenance and actualization; ensure channel teams request and receive all creative assets Time in Current Position: 1 year Accomplishments: Successfully onboarded 2 new clients and took over the client management role for 6 other accounts	Excel Campus courses ClickUp University completion American Marketing Association Retail Executives Association - DFW

6.2.3. Media Staffing. Each Proposer must describe the staffing levels and functions of its media department, identify the personnel assigned to each function, and cross reference to the personnel list as necessary, The Media Director should have a minimum of seven (7) years of relevant media experience and the Media Supervisor should have a minimum of five (5) years of relevant media experience. Media staff may include the following:

- Media Director
- Media Supervisor
- Senior Media Planner
- Media Planner
- Junior Media Planner
- Senior Media Buyer
- Media Buyer
- Junior Media Buyer

We have read, understood, and will comply. Specifics outlined in question 6.2.2.

6.2.4. Other Staff. Each Proposer must describe the staffing levels and functions of any other departments and identify the personnel assigned to the Texas Lottery account. The Proposal should include or cross-reference to information reflecting the number of years of experience and the job description for each.

We have read, understood, and will comply Specifics outlined in question 6.2.2

Contact

14175 Proton Road, Dallas, TX,
75244
9727764070 (Work)
cschembri@aletheia-na.com

www.linkedin.com/in/chrisschembri
(LinkedIn)

Top Skills

Marketing Strategy
Strategic Planning
Integrated Marketing

Honors-Awards

Silver Effie Award - Planet Earth
Media Maven

Chris Schembri

Founder, CEO at Aletheia Marketing & Media
Dallas, Texas, United States

Summary

Accomplished marketing executive focused on building brands and creating products that exemplify a range of media, marketing, and strategic planning

- Effective team leader, possessing well-developed skills in creative idea development, strategic media planning, innovation and portfolio management driving maximum innovation and creativity from all levels.
- Creative, innovative business partner that simplifies process to achieve successful business building ideas

Experience

Aletheia Marketing & Media

Founder, CEO

January 2018 - Present (4 years 10 months)

Dallas/Fort Worth Area

We are more than a Marketing & Media agency, our highly imaginative, intuitive, and factual approach to solving marketing and media challenges is what fuels us to deliver the highest level of client satisfaction.

We seek the truth by using facts to build marketing and media plans that sell our clients products, drives traffic to our client's restaurants or build our clients brands. Contact me directly at 817 917 4213

Camelot Communications

COO

May 2011 - December 2017 (6 years 8 months)

A leadership role developing trusting, long-term partnerships with a select group of clients. Building the sales and brand of our clients creating profitable

and sustainable growth. Providing unsurpassed consumer driven total communications planning and implementation.

Manage cross functional teams that drive business development and marketing strategy.

Two Tree Communications Co
President - Marketing Consultant
September 2010 - May 2011 (9 months)

Two Tree Communications Co established in 2010 by Chris Schembri, is driven by the desire to challenge traditional thinking and work with people and brands that are looking to separate themselves from their competition.

Pushing the boundaries of innovation and creating a strategic marketing and media practice that builds multi platform (digital, mobile, social media, branded entertainment and traditional media) business building communication planning.

Leveraging over 15 years of senior level marketing and media experience on major brands that include Discovery Communications, AT&T, Ford, Domino's Pizza, Shell Oil, Ikea and Wonder Bread.

AT&T
VP Media Services
February 2008 - September 2010 (2 years 8 months)

- Managed \$1.7 Billion budget driving strategic media initiatives and new media marketing for all AT&T companies including AT&T Mobility & Consumer Products, AT&T Enterprise and Yellow Pages.
- Assumed responsibility for the transition of the newly hired media agency to one overall media agency, while simultaneously building an internal media organization.
- Developed an insight and analytics team to assess media effectiveness, resulting in delivery of an econometric model that allows for a greater understanding of ROI and media impact on objectives.
- Lead development of key branded entertainment initiatives such as Dial*, American Idol and Melrose Place, Law & Order LA, and Current TV significantly driving audience awareness and improved brand perception metrics. Including the industry recognized Olympic Soundtrack promotion engaging consumers across all screens, raising over \$1 Million for the US Olympic team.

- Developed a number of first run digital initiatives including the first media campaign using Twitter, Title Tweets successfully integrated the NCAA Final Four sponsorship with consumer's appetite to follow their favorite team.
- Established and developed a new customer segmentation infrastructure using Prizm and Claritas to drive more effective targeting and media placement, delivering projected media efficiency of over \$50 Million.
- Simplified data collection and improved inputs to data centric models to project optimized media delivery and predictive modeling to drive sales and revenue.

Discovery Communications

SVP Media Planning/Marketing & Partnerships

November 2004 - February 2008 (3 years 4 months)

- Revitalized the value and optimized the media effectiveness of all Discovery Networks promotional inventory, resulting in a 10% improvement in GRP effectiveness and dollar value.
- Created a number of innovative creative solutions and technical capabilities, leading the positioning Discovery's media planning team as a leader in the use of new technology such as High Definition Outdoor, mobile phone interactions, and unique partnerships with XBOX and other gaming devices.
- Fostered research to assess media effectiveness, resulting in delivery of a greater understanding of ratings predictability and ROI on Discovery Communication's marketing objectives.
- Partnered with internal and embedded groups to simplify the process to insure successful implementation of marketing and media initiatives, achieving improved marketing and production processes, delivering savings of \$61 Million.
- Initiated and led the Global Media Council, a working group of global planning professionals designed to maintain and grow the company's leadership position by enhancing the brand and sharing best practices to grow market share and the customer base.
- Established a marketing innovation fund designed to test, measure, and learn from new media innovations insuring the Discovery Networks are leading in the use of cutting edge media marketing ideas.

University of Windsor

Lecturer

2005 - 2008 (3 years)

Windsor & Kitchener Ontario

Responsible for the development and instruction of the Marketing and Strategy curriculum for the Executive MBA.

Bestowed the honor of "Professor of the Year" by the students of the program 3 years in a row.

J Walter Thompson

Senior Partner, Communications Director

1997 - 2004 (7 years)

- Managed a media budget greater than \$125 million.
- Spearheaded the development of new media and interactive strategies using digital media and other non conventional media to drive qualified leads to test drive the new line up of Ford Division SUV's. Resulting in a 5% lift in sales.
- Developed and launched national lead generation campaigns to launch Blue Oval Certified and Ford Quality Checked using media that would efficiently reached our target and increased traffic to the dealership.
- Developed brand launch campaigns for Ford Explorer, Expedition, Escape and Escape Hybrid within an overarching brand umbrella known as Ford Outfitters.
- Created and documented an orderly process of the media planning and buying for over 150 co-op markets, resulting in flawless execution on time, on budget delivery to clients.
- Built and implemented test case for audience segmentation and market sizing through the use of census data and preliminary customer data, used to define market and launch the new Ford Escape Hybrid.

Media Buying Services, Toronto, Ontario

Senior Media Executive

1993 - 1997 (4 years)

Saffer Advertising, Toronto, Ontario

Media Estimator

1992 - 1993 (1 year)

Education

University of Windsor

MBA, General · (2003 - 2005)

Southern Methodist University

Graduate Marketing Certificate, Marketing · (2012 - 2013)

University of Windsor

Bachelor of Arts, Communications · (1988 - 1992)

Paul Dwyer High School

Contact

dalamanna@gmail.com

www.linkedin.com/in/damienlamanna (LinkedIn)

Top Skills

New Media

Integrated Marketing

Social Media Marketing

Damien LaManna

Executive Vice President at Aletheia Marketing & Media
Dallas, Texas, United States

Summary

Digital and Paid Media Strategist with nearly 20 years of crafting Integrated Marketing campaigns across a wide variety of categories including, Public Affairs/Government, Telecom, QSR/Casual Dining Healthcare/PHARMA, Commodity, Travel & Hospitality, and Consumer Packaged Goods.

Experience

Aletheia Marketing & Media

4 years

Executive Vice President, Managing Director

July 2022 - Present (4 months)

Dallas/Fort Worth Area

Work closely with CEO to spearhead overall health and growth of the agency by driving innovation, solidifying processes, and ensuring client account needs are being met.

Manages key members of the Leadership Team across a variety of disciplines and is accountable for achieving quarterly and annual objectives.

Serves as Client Experience leader for high-value accounts.

Executive Vice President, Digital

December 2020 - June 2022 (1 year 7 months)

Dallas, Texas, United States

Senior Vice President, Digital

November 2018 - November 2020 (2 years 1 month)

Dallas, Texas, United States

Led the Digital Media Practice for a growing full-service media agency with regional, national, and global clients in sectors ranging from Pharmaceuticals, Casual Dining, and Consumer Packaged Goods.

Oversaw a team of 20+ digital specialists and strategists across Paid Search, Performance Media, Data Science, and Paid Social Media.

Weber Shandwick

4 years 6 months

Senior Vice President, Digital Innovation Practice - Integrated Media
February 2016 - October 2018 (2 years 9 months)

Dallas/Fort Worth Area

Led Paid Media & Buying specialty within Weber Shandwick's Integrated Media Community across the Central region. Reported directly to Global Head of Paid Media & Channel Planning as one of three (3) North American Paid Media Investment leads.

Crafted fully integrated digital media strategies with strong focus on performance marketing, e-commerce, and shopper marketing, promoting earned and social content on a variety of platforms (Amazon, Facebook, Instagram, Pinterest, Twitter, etc.), podcast advertising, paid search, content syndication, video distribution, programmatic, and developing deep IRM and partner relationships.

Managed and cultivated talent across multiple offices and regions along with building cross-team collaboration to deliver data driven results across a wide array of categories and for clients such as Illumina, Verizon, ALDI, American Pecan Council, MilkPep, AstraZeneca, and a confidential mobile carrier.

Conducted internal company wide talent and resource audit to identify skills gaps, refine media buying processes, and assess current technology and vendor relationships.

Maintained relationships with Weber's parent company IPG and MAGNA Global, to insure Weber had access to best-in-class paid media technology, insights, and partnership agreements.

Took on several regional and North American leadership roles: served on Weber's North American Digital Innovation and Business Development Unit, acted as one of Weber's Integrated Media Community curators across North America helping to usher in a company wide talent realignment, served on a council to promote agency's Platform Fluency Initiative, advised on Brand Safety & Data Protection Committee, strengthened cross-team collaboration as a member of the Central region's IRM Task Force and Education Committees respectively.

Vice President, Digital - Paid Media

May 2014 - February 2016 (1 year 10 months)

Washington D.C. Metro Area

Built and managed the Digital Paid Media department in the D.C. office with a focus on Public Affairs and Government related clients.

Spearheaded the growth of Paid Media discipline across multiple Weber Shandwick offices, building interoffice teams and capabilities.

Managed Paid Social and SEM programs for one of Weber's largest and most successful Integrated Campaigns in Healthcare.gov.

Blue State Digital

1 year 1 month

Media Director

July 2013 - May 2014 (11 months)

Washington D.C. Metro Area

Managed Paid Media team for digital strategy firm specializing in online advocacy and fundraising.

Worked closely with Creative, Content, and Analytics teams to provide cohesive digital campaigns for public affairs, non-profit, and issue advocacy organizations.

Associate Media Director

May 2013 - July 2013 (3 months)

Morgan + Company

Digital Media Director

May 2008 - May 2013 (5 years 1 month)

Crafted and implemented fully integrated Interactive marketing campaigns to help brands amplify their message with strong focus on travel/tourism, healthcare, and retail clients.

Developed Pollie Award winning digital campaign for the Louisiana Campaign for Tobacco Free Living resulting in real policy change across the state.

NetSquared, a program of TechSoup

Co-Founder and Organizer

2008 - May 2013 (5 years)

Greater New Orleans Area

Co-founded the New Orleans chapter of global non-profit Netsquared, helping to grow the New Orleans tech and social entrepreneur community into one of the largest chapters in the world.

Pajamas Media

National Sales Manager

August 2007 - May 2008 (10 months)

Adfero Group

Director of New Media

September 2004 - August 2007 (3 years)

Executed award winning digital media campaigns for growing public affairs firm at time when online advocacy was burgeoning.

Joe Slade White & Co.

Media Planner

2002 - 2003 (1 year)

Education

College of the Holy Cross

· (September 1998 - June 1999)

Canisius College

Bachelor of Arts (B.A.), Political Science and History · (1999 - 2002)

The George Washington University

Graduate School of Political Management · (2004 - 2006)

Contact

www.linkedin.com/in/brittbaumel
(LinkedIn)
www.aletheia.com (Company)
zenzi.com/ (Company)

Top Skills

Negotiation
Print Buying
Advertising

Languages

English

Britt Baume

VP, Operations Director at Aletheia Marketing & Media
Plano

Summary

Seasoned operations director with over 10 years of experience improving the efficiency of small companies by handling their bookkeeping, invoicing, vendor relations, office management, project management, and more, allowing them to focus on their core competencies.

Experience

Aletheia Marketing & Media

3 years 3 months

VP, Operations Director

May 2022 - Present (3 months)

Dallas, Texas, United States

Operations Director

May 2019 - Present (3 years 3 months)

Dallas/Fort Worth Area

- Control all financial functions including accounting, invoicing, cash flow, cost analysis, vendor payments, employee benefits, and payroll
- Oversee employee benefits including profit sharing, insurance, flex spending accounts, and voluntary insurance programs
- Create bi-monthly financial and managerial reports and review with the CEO
- Conduct all office management duties including coordinating vendors, tracking equipment and supplies, ensuring employees have the tools needed including IT systems
- Member of the Leadership Team

Aars | Wells

Director of Operations

September 2015 - April 2019 (3 years 8 months)

Dallas, TX

- Managed financial functions including accounting, invoicing, cost analysis, and payroll

- Administered employee benefits including profit sharing, insurance, and time off requests
- Assign tasks to all producers; acting as liaison between them and the account executives
- Generated weekly and monthly financial and managerial reports
- Directed all office management duties including ordering supplies, working with building management, and maintenance of all IT systems
- Member of the Leadership Team

BeSquare Advertising

Principal

January 2008 - September 2015 (7 years 9 months)

Plano, Texas

Clients: Golfsmith, Barbeques Galore, Borders, Road Runner Sports, CSK Auto (purchased by O'Reilly Auto Parts), InkStop, SCI, and others

Provided a full suite of media and marketing services; created and implemented national and local marketing, media, and grand opening plans; researched and recommended various media opportunities in radio, print, out-of-home, and online; managed clients' advertising budgets, negotiated rates, approved invoices and provided reports; conducted post-buy analyses; and handled all back-office functions including payroll, accounting, cash flow and vendor financial relationships

- Increased sales by 21% over control stores for one client
- Achieved a 100% ROI in just 3 weeks with an endorsement radio test for another client
- Saved one client almost 60% off the ROP rates they paid with a previous agency

BI Baumel, LLC

President/Owner

February 2006 - September 2011 (5 years 8 months)

Plano, Texas

Clients: CompUSA, The New York Times, D Magazine, PAGE Cooperative, Billboard Planet, World Company Publications, Southwest Newspapers, Cape Cod Times, and others

Provided consultative services to C-level executives, including analyzing print media buys and making newspaper coverage recommendations; launched wholly-owned subsidiary Map Right, a business created to generate maps

and demographic spreadsheets to show newspaper coverage, demographic variables, and customer data; and controlled back-office functions of the business including account management, payroll, and accounting

- Revamped maps of coverage areas of all of The New York Times preprint zones
- Crafted a map of Prius ownership by ZIP code which was published in D Magazine
- Created all the maps for the Press Enterprise phone book of Susquehanna Valley, Columbia and Montour Counties, Pennsylvania

CompUSA

8 years 2 months

Media Manager

July 2004 - February 2006 (1 year 8 months)

Dallas, Texas

Managed the national Media Team of 4 buyers/planners; oversaw entire media print budget of over \$80 million; supervised all regional print buys, negotiations, media tests, and market evaluations; planned and placed all national print advertising, including Yellow Pages; administered performance reviews, hiring, and training

- Facilitated and managed the process to analyze the media buys by ZIP code in all ninety print markets, resulting in an annual cost savings of over \$10 million
- Worked closely with the Chief Marketing Officer and Marketing Directors on multiple projects including taking over the advertising for The Good Guys, a consumer electronics company purchased by CompUSA in 2003 and planning a program to target Hispanic customers

Media Supervisor

December 2002 - July 2004 (1 year 8 months)

Dallas, Texas

Promoted to Supervisor over Media Team and was subsequently promoted to Media Manager; planned and placed all national print advertising, including Yellow Pages; consulted with all areas of the Advertising department on marketing, promotions, and workflow; and implemented new mapping and demographic software

Media Analyst

July 2002 - December 2002 (6 months)

Dallas, Texas

Supported the Media Team with all their research needs, including recommendations on media buys; trained new team members to be media buyers/planners; oversaw purchasing of select national publications; and managed Yellow Page advertising program

Media Buyer/Planner

March 2000 - July 2002 (2 years 5 months)

Dallas, Texas

Examined and recommended market coverage; researched and made recommendations on performance of advertising campaigns; negotiated advertising contracts with publications; planned, placed and confirmed print media advertising; reviewed and analyzed invoices for payment, resolved discrepancies, and updated accruals; managed Yellow Page advertising; investigated and recommended Internet advertising opportunities; tracked and reported on competitive print media

- Negotiated tens of thousands of dollars per year in added value
- President's Award Winner (2001) – given out to less than 1% of all employees each year

Senior Promotions Coordinator

January 1998 - March 2000 (2 years 3 months)

Dallas, Texas

Facilitated distribution of promotional materials to stores nation-wide; analyzed and created ad hoc reports on effectiveness of promotions; updated Merchandising, Advertising, Legal, Customer Service, promotions fulfillment house, vendors, and stores on promotions activities, issues, and resolutions; trained new team members

- President's Award Nominee (1999)

Education

Texas McCombs School of Business

Bachelor's Degree, Marketing, Engineering · (1988 - 1993)

The Science Academy at LBJ High School

· (1985 - 1988)

Contact

www.linkedin.com/in/caryn-hein-0749a27 (LinkedIn)

Top Skills

Analytics

Media Planning

Marketing Strategy

Certifications

Effective Listening

Caryn Hein

VP, Strategy and Business Intelligence at Aletheia Marketing & Media

Dallas

Summary

Media Intelligence Strategist with 10+ years of agency and corporate experience. Versatile, reliable, and inquisitive leader with a background in media planning, strategy development, database management, and data interpretation for the purpose of marketing strategy and analytics. A proven builder of teams and marketable capabilities, possessing a relentless passion for the consumer story and uncovering impactful data stories.

Specialties:

Entertainment Category Planning and Research

Television Audience Trending and Research

Consumer Profiling and Segmentation

Business Analytics, Insights, and Innovation

Competitive Monitoring and Analysis

Project, People, and Budget Management

Experience

Aletheia Marketing & Media

VP, Strategy and Business Intelligence Director

December 2020 - Present (1 year 8 months)

Own the communications strategy practice and approach across clients – includes bringing data-centric thinking to briefs and execution, driving consumer and cultural insight, and serving as the connective tissue between client and agency strategy

Guide the reporting and data analytics disciplines across all clients

Assess current and future agency research investments relative to client and agency needs, developing external relationships and ensuring resources reflect modern planning and technology requirements

Havas Media Group

VP, Analytics & Data Consulting

September 2017 - December 2020 (3 years 4 months)

Boston, Massachusetts

Led analytics and data strategy for TracFone Wireless, spanning brand and Direct Response initiatives

Co-led agency team of 20+ analysts and data engineers across Boston and NY

Participated in new business planning and development, working to enhance and redefine the role of analytics and data in the agency story

MullenLowe U.S.

5 years 7 months

Vice President, Strategic Analytics

September 2014 - September 2017 (3 years 1 month)

Boston, MA

Spearheaded the inception and continual growth of the television research practice within Mullen/Mediahub; served as client lead for National Geographic Channels, PBS, TV Land, and VH1

Led a team of three analysts and worked across strategic planning, media and analytics disciplines to ensure the integration of tune in metrics and consumer trends within campaign plans and launches

Managed the analytics audience profiling team, using Nielsen, Forrester, GFK and primary research data to deliver brand personas and analysis built for actionable business objectives

Manager, Strategic Analytics

April 2013 - August 2014 (1 year 5 months)

Boston, MA

Senior Strategic Analyst

March 2012 - April 2013 (1 year 2 months)

Boston, MA

AT&T

Insights & Research, Associate Director

October 2008 - May 2012 (3 years 8 months)

Dallas/Fort Worth Area

Created and directed competitive reporting processes, working hand in hand with agency team to institute high level of quality control and consistency in data presentation

Interpreted and presented data to internal AT&T clients, ensuring insights align to strategic marketing goals and questions

Operated as primary client/contact for agency research team of 10+ members, steering daily account decisions regarding data management, governance and reporting

Developed weekly SOV/SOS reporting, used by executive clientele for media investment decisions

Initiated and guided the development and data quality of a custom Business messaging data set, resulting in the increased accuracy of reporting and providing internal client with first ever detail level view of category activity across Enterprise and Small Business

Ingenuity Media - The Martin Agency

Media Planner

October 2005 - October 2008 (3 years 1 month)

Richmond, VA

Worked as a cross-functional media planner with application and database development training, working closely with Analytics team on account data management and sales data interpretation

Developed standardized processes for running, cleaning and organizing account data used by internal Analytics team for media mix modeling

Compiled weekly sales and analytics media testing summary reports for client use

Managed and delivered weekly category analysis including TV SOV and messaging breakdowns

Aided in the creation of sales and media performance reporting system developed specifically for the Alltel Wireless client

Assisted in new business pitches, using proprietary database for national and Spot TV competitive reporting and analysis

Sinclair Broadcast Group

Traffic/Sales Assistant (WEMT - FOX Affiliate)

August 2004 - July 2005 (1 year)

Managed daily copy assignment and trafficking of national and local spots

Assisted sales team with daily tasks including generating and distributing account information and managing local buys

Education

Loyola University New Orleans

Bachelor of Arts, Communications/Advertising · (2000 - 2004)

Contact

rchelley@aletheia.com

www.linkedin.com/in/rchelley
(LinkedIn)

Top Skills

Media Strategy

Media Analytics

Media Operations

Team Development

Business Development

Technical Implementation

Languages

English

Richard Chelley

VP Implementation at Aletheia Marketing & Media

McKinney

Summary

Versatile, results-driven Marketing Executive with over 20 years of experience with business management and a proven history developing a strong team of directors. Focused on improving workflows, creating process and developing the next generation of industry leaders. Providing oversight and guidance of marketing strategies, analyzing market conditions, and ultimately generating high levels performance on behalf of clients.

Experience

Aletheia Marketing & Media

VP Implementation

November 2020 - Present

Dallas-Fort Worth Metroplex

Oversee implementation of all media, collaborating with Business Intelligence, Data Science, Planning, Client Service, Client Experience and Campaign Operations to ensure that client objectives are being met. Provide thought leadership and developing agency workflows to improve efficiencies and client results.

Dickey's Barbecue Restaurants, Inc.

Digital Marketing Director

October 2019 - November 2020 (1 year 2 months)

Dallas/Fort Worth Area

Responsible for increasing sales through the launch of web redesign and digital direct web & app. Improved user experience and directed marketing campaigns with both paid and organic media. Manage all owned/organic media channels for corporate and 500+ franchisees. Supervised all department staff, developed internal operating procedures and digital training of the marketing leadership committee.

Key Contributions:

- Digital sales increased over 250% in just 6 months.
- Customer loyalty program enrollment improved grew 150%.
- Launched SMS and Push notification through the mobile app resulting in an average 20% daily sales increase.

- Created Enterprise Report that combined sales data sales, CEM, product mix and loyalty to enrich performance analysis and predictive modeling that improved KPI's during Covid 21%.

InterMedia Advertising

9 years 5 months

Vice President Inter/Media Interactive

December 2012 - October 2019 (6 years 11 months)

Woodland Hills, CA

Responsible for identifying and implementing acquisition strategies to grow client business, as well as managing and performing in-depth analysis of all IMGC digital marketing campaigns such as programmatic, display, retargeting, rich media, search, mobile, social, streaming, affiliate, email, native, and online promotions. Manage all internal and external client relationships with complete strategic execution and oversight of all campaigns from client presentation to media selection, negotiations, implementation and analysis to achieve marketing goals. Supervised all department staff, developed internal staff training program to improve the effectiveness of each team member and managed the digital creative team, and provided creative design guidance.

Key Contributions:

- Significantly increased agency revenue and active digital clients through hands-on client management and internal education programs.
- Developed internal education program and materials to improve agency-wide understanding and consideration of digital marketing and emerging technologies.
- Successfully reengineered the internal affiliate initiative, as well as retained and expanded affiliate relationships and publisher partnerships.

Director of Digital Media

June 2010 - December 2012 (2 years 7 months)

22120 Clarendon St, Woodland Hills, CA 91367

DU Marketing

Marketing Professional

February 2009 - June 2010 (1 year 5 months)

Handled all daily operations of marketing such as brand development, content, graphic materials, affiliate partnerships, and search marketing campaigns.

Developed and managed marketing programs for startup companies and challenger brands. Performed in-depth analysis on programs and provided comprehensive reports for executives with detailed optimizations strategies. Lead business development, negotiated integrated partnership programs and marketing campaigns utilizing multiple touch points through digital and traditional media outlets.

j2 Global Communications

Marketing Manager

August 2006 - February 2009 (2 years 7 months)

Lead business development, negotiated integrated partnership programs and marketing campaigns utilizing multiple touch points through digital and traditional media outlets. Oversaw brand consistency, site usability including consumer satisfaction for all online properties.

Key Contributions:

- Worked with international offices to grow and coordinate strategies to increase brand messaging.
- Developed and executed strategies to drive site activity, desired consumer behavior and maximize revenue potential by achieving marketing goals, campaign efficiencies and new customer acquisition.

ValueClick

Online Media Planner

December 2004 - February 2006 (1 year 3 months)

Responsible for supervising and delegating daily work responsibilities of the planning and digital media team as well as translating technical information into easy to understand observations/lessons.

Key Contributions:

- Established overall direction for program, planning and negotiating strategies, and created/updated processes for training and documentation of syndicated research.
- Reported to senior management of booked to run inventory numbers and planned verses realized revenue.

Initiative

Media Planner

2004 - 2004 (less than a year)

Provided daily account management of all Interactive brand and direct response campaigns, responsible for online media revenue and promotion of accounts, including CKE, Sega, Amtrak, MGM, Luxor properties and the Blue Man Group. Performed research, planning, publisher negotiations, campaign trafficking, and tracking with post campaign analysis.

Served as member of the Junior Management Committee, which organized team building exercises designed to strengthen communication between departments.

Carat Interactive

Assistant Media Planner

2002 - 2004 (2 years)

Responsible for the daily account management and online media revenue for Carat Interactive accounts, including Adidas, Hyundai Motors America, Kia Motors America, and Jenny Craig.

- Provided the account managers with campaign research, negotiated with publisher for the most efficient rates, trafficked and reported on all digital media campaigns.

- Performed industry research on a national and local market basis and provided initial POVs and campaign recommendations.

Youbet

Software Quality Engineer

1999 - 2002 (3 years)

Contact

tom.bateman@sbcglobal.net

www.linkedin.com/in/tombate
(LinkedIn)

inboundgeo.com (Company)

Top Skills

Interactive Marketing

Integrated Marketing

Digital Strategy

Tom Bateman

VP Client Experience | Advisory Board Member

Dallas

Summary

Experienced marketer with a demonstrated history of working in the marketing and advertising industry. Strong professional skilled in Marketing Management, SEO, Digital Strategy, Integrated Marketing, Advertising, and Customer Relationship Management (CRM).

Experience

Aletheia Marketing & Media

VP, Client Experience

May 2022 - Present (3 months)

Dallas, Texas, United States

We are more than a Marketing & Media agency, our highly imaginative, intuitive, and factual approach to solving marketing and media challenges is what fuels us to deliver the highest level of client satisfaction.

We seek the truth by using facts to build marketing and media plans that sell our clients products, drives traffic to our client's restaurants or build our clients brands

inboundgeo

Executive Advisory Board

June 2019 - Present (3 years 2 months)

Dallas/Fort Worth Area

Offline lead generation and geo-locating retargeting platform that bridges the gap between online and offline worlds. We enable marketers to send customized direct mail to precise addresses of single family homes who have visited a company's website.

Terakeet

Enterprise Client Partner

July 2020 - April 2022 (1 year 10 months)

Terakeet provides online visibility and reputation management for large brands, executives, and other high-profile individuals.

Ansira

VP, Client Partner

May 2016 - May 2019 (3 years 1 month)

Ansira is the leader in modeling and activating 1st, 2nd and 3rd party data delivering performance marketing programs at a national and local level with unprecedented results and long-term profitability.

Razorfish

VP, Client Partner

July 2014 - May 2016 (1 year 11 months)

Razorfish Platforms is a full-service eBusiness firm that drives demand, conversion, retention, and client advocacy for companies worldwide. eCommerce and Content are our specialties.

Crown Partners

Director, Client Account Lead

2013 - June 2014 (1 year)

Dallas, TX

Crown is a full service eBusiness consulting company that helps growth-oriented companies acquire customers and improve digital experiences. By leveraging what's next in technology and business, Crown helps clients become what they want to be digitally, fast.

MEplusYOU Agency (formerly imc2)

VP, client partner

March 2011 - June 2013 (2 years 4 months)

Provide senior-level leadership to a multi-disciplined team servicing several high profile, high revenue generating accounts. Accountabilities include strategy, creative services, social and mobile, relationship marketing, advertising, and customer acquisition/retention efforts. Responsible for financial performance, account growth, revenue generation, and client satisfaction. Manage team of 20+ professionals across multiple disciplines.

Publicis

14 years 11 months

SVP - Group Account Director

May 2006 - November 2010 (4 years 7 months)

Successful in managing holistic consumer focused efforts from strategy development to finished execution. Extensive experiences in creating mass

marketing programs that surround consumers in multiple touch points including on-line and off-line media.

VP - Management Supervisor

January 1999 - April 2006 (7 years 4 months)

Owner/Operator

January 1996 - May 1999 (3 years 5 months)

Denton Publishing Company

General Manager

March 1993 - June 1996 (3 years 4 months)

The Bloom Agency

Account Executive

January 1990 - February 1993 (3 years 2 months)

Education

University of Oklahoma

Bachelor of Science (BS), Communication, Journalism, and Related Programs · (1986 - 1989)

Contact

www.linkedin.com/in/englishatkins
(LinkedIn)
google.com/+EnglishAtkins (Other)

Top Skills

Advertising
Bilingual-Spanish
Latin America

Languages

Spanish (Native or Bilingual)
Portuguese (Elementary)

English Atkins

VP, Client Operations at Aletheia Marketing & Media
Dallas-Fort Worth Metroplex

Summary

English Atkins is an advertising professional with a career focused on directing media strategy for international, general market, and Hispanic market advertising. Strong experience in planning traditional and digital media. Skilled in strategic budget allocation, business writing, client presentations. Broad knowledge of agency financials, procedures and training. English also worked as an Account Supervisor for two years, but her area of expertise is Media. Fluent in Spanish (speaking, reading and writing), she has enjoyed many years directing media strategy in the Latin American market (local and pan-regional, traditional and digital).

Specialties: Traditional and Digital Media Planning, Latin American Market, Airline Category

Experience

Aletheia Marketing & Media

VP, Client Operations

January 2019 - Present (3 years 7 months)

Dallas, Texas

Manage traditional and digital media strategy, relationships, and fiscal management across all clients and media partners

Create and maintain customized systems and procedures for monitoring client media budgets based on the level of granularity and reporting required for each client

Oversee management of strategic media execution across multiple channels, working with teams across all disciplines

Calise Partners

Marketing Supervisor

January 2018 - January 2019 (1 year 1 month)

Dallas/Fort Worth Area

Responsible for multi-channel marketing plans to generate home sales leads for HomeVestors in 26 markets across the southeast United States, working with over 130 franchisees

Developed monthly Direct Mail, Digital, Out-Of-Home, and Broadcast support for each market based on market size, brand maturity, sales goals, monthly KPIs, and budget parameters

Camelot Communications

Planning Director

May 2014 - December 2017 (3 years 8 months)

Dallas/Fort Worth Area

Led the effort to plan and implement media strategy for Southwest Airlines marketing initiatives in Mexico and Costa Rica, introducing and growing the Brand in these international markets. Developed international and general market multi-media and marketing plans to increase sales for Southwest Airlines. Planned, negotiated and placed all Print media for the Branson Convention & Visitors Bureau.

Emotionally intelligent senior manager, managing account coordination with cross-functional agency teams on projects and timelines, as well as hands-on budget management. Excellence in managing and exceeding client expectations through management of plans from beginning to end. Lead team responsible for development of multi-channel media planning and budget dashboards in Tableau. Actively encourage an environment of open communication and teamwork.

Core Qualifications

- Strategic planning & brand management
- Research and analysis to build go-to-market consumer initiatives
- Leadership role with internal teams on key projects
- Early adopter of digital technology and tools - competent in Tableau dashboard management
- Proficient in social media planning and content
- Strong, bilingual interpersonal communication skills

McCann Worldgroup

International Media Director

March 2002 - March 2014 (12 years 1 month)

Dallas/Fort Worth Area

March '02 – March '14

TM Advertising / McCann Worldgroup – International Media Director –
American Airlines

- Managed media strategy (traditional and digital), budget allocation, local agency relationships and fiscal maintenance for Latin America/Caribbean, Europe (excluding the UK), Japan, China, Korea and Hong Kong
- Managed media product developed by teams in over 30 McCann Worldgroup offices
- Created and implemented media procedures manual, conducted regular media training seminars
- Designed budget spreadsheet to monitor effects of foreign exchange

March '05 - October '07

Account Supervisor, Latin America – American Airlines

- Managed Client/Agency relationships in 29 countries and supervised a team of three account executives
- Implemented both brand and tactical advertising programs throughout the region
- Developed SWOT analysis, communication planning and creative briefs
- Supervised production of Television, Print, OOH, Online and Radio

DDB International

Media Supervisor

April 1994 - March 2002 (8 years)

Hired to manage all media planning for American Airlines in 17 Latin American countries due to my Spanish speaking ability and proven Media expertise.

Ornelas & Associates

Media Planner / Account Executive

December 1990 - April 1994 (3 years 5 months)

- Served as Account Executive on Tabasco with responsibilities for US Hispanic marketing strategy, media planning, client presentations, conference/status reports, budget maintenance, and relationship building
- Developed and presented US Hispanic media plans for the following clients: Bank One, GTE, Imperial Sugar, Tabasco, and Wrangler
- Bought outdoor and Spanish language print, radio and television in AZ, NM and TX for the clients listed above and others, including Pepsi-Cola

TracyLocke

Media Assistant

November 1989 - December 1990 (1 year 2 months)

Education

Texas A&M University

B.A., Modern Languages, Spanish

Universidad de Santiago de Compostela

Summer Semester, Advanced Spanish

Contact

jenna.r.v.lee@gmail.com

www.linkedin.com/in/jenna-lee-mba-271220135 (LinkedIn)

Top Skills

Microsoft Excel

Time Management

Microsoft Office

Languages

Korean (Elementary)

Jenna Lee, MBA

Accounting Manager at Aletheia Marketing & Media
Bixby

Summary

Experienced Accounting Specialist with a demonstrated history of working in the oil and gas and marketing industries. Skilled in Microsoft Word, Accounting, Administration, Time Management, and Microsoft Excel. Strong accounting professional graduated from Northeastern State University.

Experience

Aletheia Marketing & Media

Accounting Manager

February 2021 - Present (1 year 3 months)

EY

1 year 7 months

Assurance Staff 2

August 2020 - February 2021 (7 months)

Assurance Staff 1

August 2019 - August 2020 (1 year 1 month)

Bartlesville, Oklahoma

Helmerich & Payne

Fixed Assets Accounting Intern

October 2017 - July 2019 (1 year 10 months)

Tulsa, Oklahoma

Performed inventory fluctuation analysis for all warehouse locations

Recorded monthly inventory levels for all warehouse locations

Performed account reconciliations for Odessa and Dickinson warehouse locations

PwC

Core Assurance Intern

June 2018 - August 2018 (3 months)

Tulsa, Oklahoma

AcrobatAnt

Accounting Intern

January 2017 - September 2017 (9 months)

Processed invoices from vendors

Processed media invoices, properly allocating costs to respective clients and tasks

Created journal entries for expenses

Oral Roberts University

Student Worker

May 2015 - August 2017 (2 years 4 months)

Tulsa, Oklahoma Area

Student Worker at Student Success and Retention

Create schedules for incoming undergraduate students

File and sort student files

Use Microsoft to keep track of miscellaneous information

Education

Northeastern State University

Master of Business Administration - MBA · (2018 - 2020)

Oral Roberts University

Bachelor's Degree, Accounting · (2014 - 2018)

Contact

lukas.thompson94@gmail.com

www.linkedin.com/in/lukas-thompson-a6465180 (LinkedIn)

Top Skills

Marketing Communications

Social Media

Marketing

Languages

English (Native or Bilingual)

Spanish (Limited Working)

Certifications

Facebook Blueprint Certified

Marin Certified Search Specialist

Google Adwords Certification

Yahoo Gemini Certified

Twitter Flight School

Bing Ads Accredited Professional

Honors-Awards

Honors in the Liberal Arts

BBA Scholar

SMU Provost Scholar

Lukas Thompson

Director of Paid Social at Aletheia Marketing & Media

Dallas-Fort Worth Metroplex

Summary

I am an experienced digital marketing professional and graduate of the Edwin L. Cox School of Business at Southern Methodist University currently working on paid social for Aletheia Marketing & Media. I have an extensive background in B2B advertising and Lead Generation, and have worked on accounts in many diverse industries, including telecommunications, pharma, and QSRs, to name a few.

Beyond my work history includes experience in print, online, and radio advertising, copywriting/ghostwriting for websites and blogs, as well as practical sales experience.

Aside from my degree in Marketing, I also studied music and English literature, which has given me a great appreciation for fine arts, and is something I bring into all my projects. I was raised in Texas, but I am a true world traveler. I've ridden dirt bikes off-road in the deserts of Utah and Arizona, seen breaching whales off the coast of Maui, and was nearly attacked by a shark diving the world famous Blue Hole in Belize. I'm looking for a career that will give me an adventure like this every day of my life.

Experience

Aletheia Marketing & Media

1 year 3 months

Director of Paid Social

September 2021 - Present (8 months)

Dallas-Fort Worth Metroplex

Associate Director of Paid Social

February 2021 - September 2021 (8 months)

Addison, Texas, United States

Hearts & Science

4 years 5 months

Supervisor

March 2020 - February 2021 (1 year)

Dallas, Texas, United States

Senior Strategist

September 2019 - March 2020 (7 months)

Dallas/Fort Worth Area

Strategist, Biddable Investments

February 2018 - September 2019 (1 year 8 months)

Dallas, Texas

Added Responsibilities include:

- Creation of paid advertising across multiple social platforms
- Overseeing growth of and teaching Assistant Strategists
- Optimization of social campaigns to ensure best performance and complete delivery

Assistant Strategist, Biddable Investments

October 2016 - February 2018 (1 year 5 months)

Dallas/Fort Worth Area

Responsibilities include:

- Always representing the clients' interests
- Provide point-of-view on various digital media tools in the marketplace
- Create digital/integrated media plan recommendations and alternatives
- Investigate innovative approaches to strategically reach the target consumer
- Measure media performance to determine the extent to which the original objectives and strategies were met
- Respond to the flow of client media-related issues as pertains to digital role
- Ensure a good working relationship with strategy, creative & client teams to facilitate execution of plans
- Handle any client requests – i.e. plan changes, budget changes, provide marketplace information
- Creation of IOs, and actualization and reconciliation for billing purposes

HALL Group

Digital Marketing Intern

May 2016 - October 2016 (6 months)

Dallas/Fort Worth Area

Daily responsibilities included:

- Handling the day to day operation of HALL Group's various social media accounts, including crafting/scheduling content and responding to commenters
- Copywriting for the updates of several HALL Group websites and updating content post-launch as necessary
- Directly assisting the VP of Marketing in various projects
- Crafting comprehensive analytics reports on the performance of HALL Group social channels
- Basic design work, involving the use of Adobe Acrobat, Photoshop, and InDesign
- Maintaining HALL Group's email marketing database

Dallas Stars

50/50 Raffle Salesperson

February 2016 - May 2016 (4 months)

Sold 50/50 raffle tickets at Dallas Stars and Dallas Mavericks home games, the proceeds of which go to fund the charitable activities of the Dallas Stars Foundation and Dallas Mavericks Foundation. This position involved:

- Interacting with fans, informing them of the purpose of the raffle
- Direct selling to an often disinterested crowd
- Handling large amounts of cash sales
- Interfacing with new technology

ThinkWell Consulting, LLC

Social Media Marketing Intern

September 2015 - February 2016 (6 months)

Plano, TX

Responsibilities included:

- Crafting content for clients' social media feeds
- Forming content calendars
- Compiling comprehensive analytics reports on the performance of social media campaigns
- Writing/ghostwriting blogs for company websites
- Contributing on key messaging and branding meetings

Acuity USA

Marketing/Branding Intern

May 2015 - August 2015 (4 months)

Responsible for updating Acuity's 7+ year old website:

- Sourced multiple RFP's from web design firms, coming in significantly under my given budget
- Worked directly with web designers on build-out, acting as the primary point of contact
- Crafted new copy for the website that more properly reflected company's brand image
- Selected images and testimonials that highlight the company's success

Other projects completed were the updating of various marketing related brochures and the design of a 15th anniversary promotional coin, which was manufactured and distributed to clients.

Texas Discovery Gardens

Marketing/PR Intern

June 2013 - August 2013 (3 months)

Responsibilities included:

- Managing the Garden's Facebook and Twitter feeds
- Drafting press releases for upcoming festivals and events for local and regional news outlets
- Wrote and recorded a radio advertisement which appeared on WRR Classical 101.1 in Dallas
- Created print and web advertisements with Adobe Creative Suite, including Photoshop and InDesign
- Interacting with local small business owners with sponsorship offers

Education

Southern Methodist University

Bachelor of Business Administration (BBA), Marketing, English

Minor • (2012 - 2016)

Southern Methodist University - Cox School of Business

Bachelor of Business Administration (BBA), Marketing • (2012 - 2016)

Contact

nbaumgarten17@hotmail.com

www.linkedin.com/in/nancy-baumgarten-911ab647 (LinkedIn)

Top Skills

New Media

Social Media Marketing

Digital Strategy

Nancy Baumgarten

Strategy Director

United States

Summary

Experienced Strategy/Media professional with a demonstrated history of success in all aspects of media planning and buying. Knowledgeable of Digital and traditional channels. Proficiency in multiple research and media platforms. Developed and managed agency strategy/media departments.

Experience

Aletheia Marketing & Media

Strategy Director

February 2022 - Present (6 months)

Dallas, Texas, United States

interTrend Communications, Inc.

Senior Media Planner

October 2019 - February 2022 (2 years 5 months)

Plano, Texas

Junior Achievement of Dallas, Inc.

Vice President of Business Development

July 2018 - October 2019 (1 year 4 months)

Richardson, TX

Plano Symphony Orchestra

Director of Corporate and Community Relations

August 2012 - July 2018 (6 years)

Plano, TX

Levenson & Hill

Vice President of Media Planning

2005 - August 2012 (7 years)

Dallas, TX

Education

Drexel University

Master of Science (MS), Arts Administration · (2009 - 2012)

Texas Tech University

Bachelor of Arts (BA), Advertising/Spanish · (1980 - 1984)

Contact

www.linkedin.com/in/patasher
(LinkedIn)

Top Skills

Media Buying
Digital Media
Online Advertising

Certifications

Trading Academy Certified –
Connected TV
Trading Academy Certified -
Professional

Pat Asher

Digital Media Investment, Planning and Strategy
Los Angeles Metropolitan Area

Summary

- # Extensive experience in Digital Media Planning and Buying
- # Conceived, pitched and executed innovative online media campaigns
- # Expert in cross platform video executions
- # Launched Digital Division for two agencies
- # Proven success in exceeding client's goals
- # Category experience: CPG, Entertainment, Auto, QSR, Retail, Health, Insurance & Financial
- # Successful history of working with top advertisers including P&G
- # Strong strategic thought leadership
- # Experience on both the client and agency side
- # Established relationships with top publishers
- # Commitment to continual growth of digital knowledge to stay ahead of the trends
- # Designed process flow for Digital Media and Ad Operations departments

Experience

Aletheia Marketing & Media
Digital Media Director - Programmatic
November 2021 - Present (6 months)

All My Sunshine Media
Digital Media Investment and Strategy Consultant/Owner
February 2016 - Present (6 years 3 months)

InterMedia Advertising
Digital Media Consultant
June 2016 - November 2021 (5 years 6 months)
Woodland Hills

ID Media
Media Strategy Director

May 2015 - February 2016 (10 months)

Quigley-Simpson

Director, Digital Media

January 2009 - January 2015 (6 years 1 month)

Procter & Gamble

KSL Media

Director of Digital Media

January 2008 - January 2009 (1 year 1 month)

Barkley

Interactive Media Supervisor

January 2006 - January 2008 (2 years 1 month)

Butler Shine Stern & Partners

Online Media Supervisor

2005 - 2006 (1 year)

Thompson & Company

Online Media Planner

2003 - 2005 (2 years)

Conversant Relationship Marketing

Interactive Media Specialist

2003 - 2005 (2 years)

LowerMyBills

Media Buyer

2002 - 2002 (less than a year)

WeddingChannel

Online Media Manager

2001 - 2001 (less than a year)

Icebox.com

Online Media Manager

1999 - 2000 (1 year)

USSearch.com

Online Media Manager
1998 - 1999 (1 year)

Century Direct
Analytics and Research
1996 - 1998 (2 years)

Education

University of Missouri-Columbia
BA, Political Science

University of Missouri-Columbia
Bachelor's degree

Contact

pjnessing@gmail.com

www.linkedin.com/in/pjnessing
(LinkedIn)

Top Skills

Interpersonal Communication

Online Advertising

Advertising

Honors-Awards

Anderson Award Nominee

Anderson Award Nominee

Patrick Nessing, MBA

Programmatic Manager - Aletheia - Marketing & Media
Greenville, South Carolina, United States

Experience

Aletheia Marketing & Media

Programmatic Manager

August 2022 - Present (3 months)

Dallas, Texas, United States

Techtronic Industries - TTI

2 years 7 months

Culture Committee Member

March 2022 - Present (8 months)

Assistant Marketing Manager - Digital Marketing & Data Analysis

November 2021 - August 2022 (10 months)

Marketing Coordinator - Paid Advertising

September 2021 - November 2021 (3 months)

Anderson, South Carolina, United States

Marketing Coordinator - Walmart.com

January 2021 - September 2021 (9 months)

South Carolina, United States

Field Sales and Marketing Representative

April 2020 - December 2020 (9 months)

Santa Clara, California, United States

Welk Resorts

Sales And Marketing Agent

January 2020 - February 2020 (2 months)

Concord, California, United States

MOVE IT UP MARKETING, INC.

Internet Marketing Specialist

January 2020 - February 2020 (2 months)

REI

1 year 9 months

Hiring Manager

August 2017 - June 2018 (11 months)

Operations Lead

March 2017 - June 2018 (1 year 4 months)

Sales Specialist

October 2016 - March 2017 (6 months)

La Sierra University

IT Technician

2014 - 2015 (1 year)

Old Navy

Retail Salesworker

2013 - 2014 (1 year)

Lone Tree Golf Club

Service Technician

2012 - 2012 (less than a year)

Monterey Bay Academy

Teacher Assistant

2011 - 2012 (1 year)

Soquel Campmeeting

Parking Security

2011 - 2011 (less than a year)

Education

Azusa Pacific University

Master of Business Administration - MBA, Business, Management, Marketing,
and Related Support Services

Escuela Superior de Español en Sagunto

La Sierra University

Bachelor's degree , Business Administration and Management, General

Contact

skatsikas@smu.edu

www.linkedin.com/in/sarahskatsikas (LinkedIn)

Top Skills

Media Planning

Digital Media

Social Media Marketing

Languages

Spanish (Professional Working)

Certifications

Meta Certified Digital Marketing Associate

Honors-Awards

Best Media Plan

TAI's Anchor Award

Sarah Katsikas

Paid Social Media Manager | Aletheia
Dallas

Summary

I offer creative problem solving and a strong knowledge of digital media vehicles to help generate innovative ideas and brand strategies.

Experience

Aletheia Marketing & Media

Paid Social Media Manager

May 2022 - Present (3 months)

Dallas, Texas, United States

- Social implementation lead across 12 clients with varying budgets and business goals
- Identify new opportunities and recommendations as well as actively optimizing live campaigns to ensure success
- Speak on reporting calls to showcase campaign performance to client
- Budgets media dollars based on client goals and campaign performance

Hearts & Science

1 year 5 months

Strategist, Social

November 2021 - May 2022 (7 months)

Dallas-Fort Worth Metroplex

- Lead paid social strategist for AT&T Prepaid and Cricket Wireless
- Presented biweekly performance metrics across social platforms to client
- Facilitated new social opportunities for clients
- Budgeted million dollar media plans that aligned with AT&T business goals and MTA performance
- Planned Cricket Wireless sponsorship initiatives with WWE and HBCUs

Assistant Strategist, Social

January 2021 - November 2021 (11 months)

Dallas, Texas, United States

David Swaim & Associates, P.C.

Marketing Coordinator (Part-Time)

August 2020 - January 2021 (6 months)

Dallas, Texas, United States

- Worked with the Marketing Consultant to implement new marketing tactics that support the rebranding of an Immigration Law Firm
- Created content calendar for social media and thought leadership blog posts while running the firm's LinkedIn and Facebook
- Reported leads, impressions, and contacts gained from each media
- Connected with online vendors and publications to implement ad buys and communicate media plans to client

American Advertising Federation

National Student Advertising Competition- Media Planner

January 2020 - May 2020 (5 months)

Dallas, TX

- Lead the media team to put together an award winning business-to-business media recommendation for Adobe Experience Cloud for Advertising
- Assisted in design and structure of presentation to industry professionals and client

FreeRange Concepts

Marketing Intern

August 2019 - December 2019 (5 months)

Dallas, TX

- Assisted with efforts to advertise events and promotions by utilizing social media and digital advertising
- Produced owned media for each brands' social media accounts
- Created various print and digital graphics for upcoming events and shows

Slingshot

Media Intern

June 2019 - August 2019 (3 months)

Dallas/Fort Worth Area

- Created a goal-oriented strategy to implement a media recommendation to best drive awareness and increase online conversions for Neiman Marcus Last Call
- Compiled and gathered market research
- Developed competitive spending analysis
- Helped maintain files and documentation on media opportunities

Skats Kritters

Self Employed

January 2014 - January 2019 (5 years 1 month)

Westchester, NY

- Established a pet sitting business for families who are going on vacation or work full time
- Designed and created my business with a website, campaign flyers, logos, and business cards
- Utilized social media to advertise my business
- Gained responsibility by walking, boarding at home, and taking care of many different types of pets
- Donated part of profits to charitable organizations

Bailey Blue Clothing

Intern

May 2016 - June 2016 (2 months)

NY, NY

- Assisted the Head of Sales
- Learned how to present clothes to clients for Market Week
- Created digital photo packages for potential clients

Education

Southern Methodist University

Bachelor's degree, Advertising · (2016 - 2020)

Rye High School

· (2012 - 2016)

Contact

lauren.shae.owens@gmail.com

www.linkedin.com/in/lauren-lashae-owens (LinkedIn)

Top Skills

Process Improvement

Digital Marketing

SEO

Languages

English (Native or Bilingual)

Certifications

Google Ads Display Certification

Google Analytics Certified

Google Ads Video Certification

Google Ads Search Certification

Google Ads Shopping Certification

Publications

Importance of Online Reviews for Your Hotel

Lauren LaShae Owens

Associate Digital Director at Aletheia Marketing & Media
Dallas-Fort Worth Metroplex

Summary

An SEO & Paid Media enthusiast, with a knack for digital marketing-- I'm looking for an intellectual, innovative environment to showcase my digital marketing skills.

A self-motivated, positive individual with the goal of being an inspiration to others. Every day I strive to develop new competencies, in an effort to collaborate positively with teammates to meet and exceed expectations. My philosophy: dreams are attainable through hard work and faith.

Experience

Aletheia Marketing & Media

Associate Director

June 2022 - Present (2 months)

United States

Focusing on Paid Media and SEO Management while developing new process and scopes of work.

Wpromote

7 years 1 month

Senior Digital Marketing Manager

April 2021 - June 2022 (1 year 3 months)

United States

Head of SEO for one of the largest multi-family companies in the USA. While managing my own book of paid media, paid social, display, and SEO book of business for 35+ clients.

Responsibilities include but are not limited to:

- Creating and managing the deliverable completion of a 3 tier SEO program
- Manage all SEO deliverables, paid campaigns, and client partnerships of 2 portfolios equaling 35+

properties.

- Providing detailed monthly reporting for the entire teams SEO portfolio's
- Creating and managing the SEO training for our team
- Facilitating communication with external partners and providing training for all the SEO processes.
- Assisting with hospitality and SMB SEO as well.
- Monthly paid search and social reporting with optimizing campaigns.
- Blog and onsite content writing.

Digital Marketing Manager

November 2016 - January 2022 (5 years 3 months)

Dallas/Fort Worth Area

Wpromote is an LA-based digital marketing agency that promises proactive and professional digital solutions that inspire trust, instill confidence and activate results. We help clients develop & execute their digital strategies to reach their online goals.

My Tasks:

Review, update and develop keyword strategies, metadata, image alt tags and on-page content for 72 clients' websites

Complete competitive backlink analysis, search for new link opportunities, perform outreach to qualified websites and create link reports to increase the number of websites linking to my clients' websites

Communicate effectively with clients in order to proactively determine and anticipate their needs and wants as well as to provide superior client service

Leverage data visualization tools to assist my clients in their online needs and be considered as a partner

Work with on-site SEO Directors, and the VP of Marketing to facilitate a positive environment for achieving performance metrics

Undergo continuous SEO and PPC training regarding the methods and techniques currently utilized in the Digital/Interactive Marketing industry

Digital Marketing Coordinator

June 2015 - November 2016 (1 year 6 months)

Dallas/Fort Worth Area

I implement key SEO tactics. This included (but is not limited to) the following areas:

- Keyword Analysis
- Keyword Research
- Data Analysis
- Citation Analysis
- Backlink Audits
- Photo Optimization
- Quarterly Reporting

Experience with the following platforms:

- Yext
- Google My Business
- SEMRush
- Majestic
- Advanced Web Rankings
- Moz Local
- AWR - Advanced Web Ranking System

Education

The Art Institutes
Interior Design · (2011 - 2012)

Bowie High School
High School Diploma, General Studies · (2004 - 2008)

Contact

214-669-5732 (Mobile)
troyminaldi@sbcglobal.net

www.linkedin.com/in/troyminaldi
(LinkedIn)

Top Skills

Brand Development
Marketing Strategy
Retail Marketing

Troy Minaldi

Senior Marketing Pro With Expertise in Multi-Unit Retail & Franchise
Concepts | Agency | Promotions | Brand Strategy
Dallas-Fort Worth Metroplex

Summary

Troy Minaldi

Email: troyminaldi@sbcglobal.net Cell Phone: 214-669-5732

I am a senior director of marketing with deep experience developing integrated marketing programs for a variety of multi-unit retail and franchise companies. I help them increase their brand awareness, drive customer traffic, and build loyalty using data and research-driven marketing. I manage the entire campaign process including strategy, targeting, segmentation, messaging, media mix, creative development, execution, and analysis/optimization. I have created omni-channel marketing solutions across broadcast, targeted print and direct mail, web, search, social, strategic content, in-store signage/POP and sales support.

With my personable work style, I create bridges across organizations and have had great success leading internal and external teams in marketing strategy and planning. I understand the importance of cross-functional collaboration and am comfortable working with all levels of management in understanding how the brand permeates the entire company. No, I don't beat people over the head with it. Instead, I try to make sure everyone understands the "method behind the marketing madness" and can then rally company-wide marketing support!

I have a passion for developing, coaching, and mentoring marketing teams. I am a big believer in teamwork and am perfectly willing to roll up my sleeves and do the tough work alongside my teams to deliver multiple projects under tight deadlines. I also enjoy directing external agencies and resources toward a common brand goal.

Expertise

- Multi-Unit Retail and Franchise Marketing
- Integrated Campaign Development
- Customer Experience Marketing

- Promotional Strategy & Planning
- Content Strategy & Execution
- Broadcast Production/Management
- Digital Engagement Programs
- Digital Media and SEM
- Search Optimization Programs (SEO)
- Local Search Marketing
- Content Development
- Programmatic Content at Scale

Experience

Aletheia Marketing & Media

Client Services Supervisor

November 2021 - Present (6 months)

Dallas-Fort Worth Metroplex

Serve as agency contact and source for all budgets, approvals, and tactical client management working with internal teams and external clients daily.

Manage traditional and digital campaigns for multiple clients.

Dickey's Barbecue Restaurants, Inc.

Marketing Brand Director

March 2020 - March 2021 (1 year 1 month)

Dallas, Texas, United States

Managed Dickey's brand consistency across all marketing channels. The go-to marketing subject matter expert for all cross-functional strategies and teams. Assisted franchise owners with maximizing new store openings and local store marketing efforts through turnkey programs and training. Managed \$12,000,000 marketing budget.

- Helped drive digital business from 4% of total sales to over 43% in just 6 months by introducing a new digital media agency and shifting creative and copy to reflect more transaction driving messaging.

- Launched 3 integrated brand campaigns and full 2021 marketing plan for 80th Anniversary.

GPO

Account Director

October 2017 - December 2019 (2 years 3 months)

Dallas, TX

A digital technology agency providing digital strategy, search marketing, store location pages, location data management, dynamic content generation, and paid media for large consumer brands.

Built and nurtured trusted advisor client relationships for national multi-location clients including Chili's, Maggiano's, Domino's, State Farm, and Hyatt. Led all local search improvement programs for clients.

- Evolve client relationships as a trusted advisor, ensuring 10X ROAS, high-quality consumer experiences, and continuity of client service.
- Launched search optimized location pages for multiple clients that significantly increased organic traffic from Google leading to triple digit growth in calls, clicks, and location visits.
- Improved Chili's Google listing accuracy from 74% to 95% in 4 months by leading internal teams and implementing recommendations with client.
- Increased visibility, efficiency, and accountability to client project work by launching new Agile methodology and Trello management for State Farm and Hyatt clients.

Rent-A-Center

8 years 6 months

Senior Director, Brand and Marketing Communications

February 2015 - November 2016 (1 year 10 months)

Plano, TX

\$3 billion Fortune 500 rent-to-own retailer specializing in home furnishings without the need for credit. 2500 stores nationwide and Mexico.

Developed and managed brand and promotional campaigns for all core brands. Led cross-functional teams to plan and execute promotional strategies to increase consideration for Rent-A-Center and drive customer traffic (in-store and online) for company-owned and franchise locations. Managed \$87,000,000 budget.

- Increased new customer generation from FSI program to all-time high of 42% and kept ROI at 400-500% by leveraging consumer preference and messaging research.

- Increased marketing-influenced sales by 22% in one year through media and customer mix analysis & data-driven marketing and advertising programs.
- Reduced advertising production time by 10 weeks allowing for more relevant offers and product mix to be included by reengineering and formalizing promotional planning processes across multiple internal and external functions/teams.
- Saved \$13,000,000 in broadcast spend by working with media agency to develop new broadcast strategy emphasizing frequency as well as implementing new customer segmentation studies with targeted and relevant brand messaging which also drove improved direct marketing response.
- Reversed negative social media sentiment trend through strategic posting analysis, consumer feedback, and integrated messaging programs.

Director of Advertising

June 2008 - February 2015 (6 years 9 months)

Plano, TX

Planned and managed integrated omnichannel national advertising campaigns for all Rent-A-Center brands. Directed internal teams and agency partners on strategy, media mix, creative development, execution, and analysis. Managed \$90,000,000 marketing budget.

- Key leader in launching engagement marketing programs, including company's first social media and life cycle email programs that used customer demographic data, behavioral data, and analytics to drive creative execution.
- Drove efficiency and increased incremental revenue of direct mail by 48% through consistent champion/challenger creative and messaging tests as well as implementing findings from program analytics.
- Improved consistency of field execution for marketing and sales programs by 15% by launching promotional training videos for field coworkers.
- Helped drive online eCommerce sales/rental leads for locations through consistent consumer experiences via the website and digital advertising programs including SEM, SEO, social, and email.

- Launched franchise marketing support program consisting of national advertising support, national marketing fund management and reporting, and development of local store marketing programs.

Bluegreen Communities

Marketing Director

March 2007 - March 2008 (1 year 1 month)

Plano, TX

One of the nation's largest land developers for master-planned residential communities with \$164 million in revenue. Part of Bluegreen Corporation. Company has since been sold.

Directed strategic marketing plans for multiple residential communities, including market analysis, segmentation, lead generation, advertising channel strategy, sales support, and conversion analysis. Managed \$4,000,000 advertising budget.

- Exceeded lead generation targets every quarter by introducing efficiencies to North Texas communities through standardized marketing programs.
- Beat initial goals of leads and sales for launch of new neighborhood community, The Bridges, by developing and executing direct marketing plan consisting of direct mail, website, email, and telemarketing.

Brook Mays Music Group

Vice President of Advertising

December 2004 - August 2006 (1 year 9 months)

Dallas, TX

Large, full-line musical instrument retailer with 63 stores nationwide and \$160 million annual revenue at the time. Company liquidated.

Planned and directed all aspects of marketing and advertising strategy, managing \$4,000,000 budget. Managed in-house creative team. Saved over \$30,000 in production costs by developing a streamlined print program coordinating multiple brands requiring specific versions all under parent brand Brook Mays Music Group.

Schlotzsky's

Field Marketing Consultant

March 2003 - August 2004 (1 year 6 months)

Austin, TX

International franchise restaurant chain serving customers in 37 states and six foreign countries, with revenues of \$57 million at the time.

Provided marketing support and media planning for 26 DMAs, 200 restaurants, and 100 franchise partners. Advised local advertising cooperatives on national and local marketing plans worth over \$2,600,000. Drove 10% improvement in same-store sales from prior year by managing efficient field spending in local store marketing budgets.

Palm Beach Tan

Director of Marketing

August 2001 - August 2002 (1 year 1 month)

Carrollton, TX

Largest indoor tanning chain in the U.S. with \$30 million in revenue at the time.

Managed entire marketing program, including strategy, research, marketing message, media selection and placement, public relations, and agency management. Oversaw \$2,000,000 budget. Led company to adopt trendsetting brand identity that improved customer and stakeholder image of company while preparing for national franchise rollout. Launched franchise local marketing program.

Snelling Staffing

Senior Director of Marketing, Director of Marketing, National Marketing Manager

August 1997 - May 2001 (3 years 10 months)

Dallas, TX

Franchised staffing firm with 300 locations and \$600 million in revenue at the time.

Directed national marketing program from strategy formulation and creative development through program execution and franchise marketing support. Launched largest consumer-marketing program in company history by gaining commitments from over 85% of franchise- and company-owned offices to fund \$3,000,000 direct-response television initiative.

The Walt Disney Company

Affiliate Marketing Representative, The Disney Channel

June 1992 - August 1997 (5 years 3 months)

Dallas, TX

Created proactive marketing campaigns utilizing direct mail pieces, product inserts, telemarketing, and other advertising to cable executives aimed at increasing the promotion and distribution of The Disney Channel. Developed high-energy, creative and motivational training modules to ensure proper product positioning and efficient field implementation.

Nestlé Purina North America

District Sales Representative, Grocery Products

May 1991 - May 1992 (1 year 1 month)

Houston, TX

The Quaker Oats Company

Gatorade Merchandising Team Leader, Assistant Sales Representative, Merchandiser

May 1985 - May 1991 (6 years 1 month)

Worked during breaks while attending college and graduate school.

Education

Texas A&M University

Master of Science - MS, Marketing

Texas A&M University

Bachelor of Business Administration - BBA, Marketing

Chelsea Enright

Frisco, Texas, United States

chelsea@mediastewards.com

<https://www.mediastewards.com/>

Summary

She joined The Ward Group in 2009, where she immediately began learning the ropes of media buying. Chelsea's initial focus was on the Texas Lottery account, placing and auditing ads in the print department. With a firm understanding of print media, her next few years were spent gaining experience with senior level buyers in outdoor, radio and TV. The insights she gained helped mold her into the well-rounded media buyer she is today.

Chelsea thoroughly enjoys the process of negotiation. She has a great instinct for uncovering angles that lead to big wins for our clients in the buying process. We find great satisfaction in knowing that we are creating great media exposure for our clients by maximizing their dollars. Chelsea's analysis, research and negotiations are certainly a big part of that, which has led to great successes for our clients, including Sally Beauty, Veterans Land Board, Conn's Home Plus, Park Place Dealerships, Pollo Campero, CareNow, CHRISTUS Health and others.

Experience



Product Specialist

Productions Plus – The Talent Shop

2005 - 2009 (5 years)

Traveled to auto shows across the country as a spokesperson for Toyota's new vehicles.



Media Buyer

The Ward Group

Sep 2009 - Present (13 years 2 months +)

Responsible for research, planning and placement of various video (TV & online), audio (terrestrial and streaming), outdoor, print and other media.

Education



University of North Texas

Fashion Merchandising

2002 - 2003



University of Oklahoma

Marketing

1996 - 1999

Skills

Negotiation • Collaboration • Strategic Planning • Media Planning

Contact

803 Yellow Tavern Court
Grand Prairie, TX 75052
972-896-3873 (Work)
lisa@lmgmediaservices.com

www.linkedin.com/in/lmgmedia-lisa-gomes (LinkedIn)

Top Skills

Media Planning

Media Buying

Advertising

Certifications

HUB (Historical Underutilized Business)

MBE (Minority Business Enterprise)

WBE

NCTRCA

SBE (Small Business Enterprise)

Lisa Michelle Gomes

Principal/LMG MEDIA LLC Media Planning and Buying Services
Dallas-Fort Worth Metroplex

Summary

LMG MEDIA... it's in the name. 25+ years of planning, negotiating, and holding media vendors accountable on my clients' behalf. Whether I'm executing strategies for multi-million dollar campaigns or a few thousand dollars, both receive the same level of attention to detail as if the client's money was my own. Those who have worked with me know my reputation for driving down costs while ensuring the best opportunity to succeed.

At LMG MEDIA, I see your success as my own... if for some reason you are not happy with the results, I take it personally. I want your media budget to perform and will use my substantial negotiation and media strategy skills to earn the right to keep your business. I would consider it a privilege to earn your trust and show you why you'll want to keep coming back.

LMG MEDIA has experience in the following media services:

- television: spot broadcast, spot cable
- radio: spot
- print: national and local newspaper/magazines
- out of home: billboards, transit and all other placed-based media
- online display and video
- sports marketing
- market knowledge and experience across the US

lisa@lmgmediaservices.com

972-896-3873

www.lmgmediaservices.com

Experience

LMG MEDIA LLC

Principal/Media Planning and Buying Services

February 2018 - Present (4 years 9 months)

Grand Prairie, Texas

Moroch

Director of Media Operations

February 1993 - October 2017 (24 years 9 months)

Education

McNeese State University

· (1981 - 1985)

Abbie Krestakos

Chicago, Illinois, United States

 abbiekrestakos@gmail.com

 [linkedin.com/in/abbie-krestakos-37881ba7](https://www.linkedin.com/in/abbie-krestakos-37881ba7)

Summary

Experienced in Marketing and Media with a demonstrated history of working in the advertising industry. Skilled in media buying & planning, advertising in traditional and digital, managing social media platforms, and working on and leading a team.

Experience

Media Buyer

RLM

Apr 2021 - Present (1 year 7 months +)

Marketing Manager

Live Nation Entertainment

Jan 2020 - Dec 2020 (1 year)

Marketing Assistant

Live Nation Entertainment

Feb 2017 - Jan 2020 (3 years)

Education

Grand Valley State University

Bachelor of Science (B.S.)

2014 - 2017

Skills

Media Buying • Media Planning • Digital Media • Google Ads • Google Suite • Leadership • Social Media Marketing • Email Marketing • Customer Service • Microsoft Office

Abbie Krestakos

Chicago, Illinois, United States

 abbiekrestakos@gmail.com

 [linkedin.com/in/abbie-krestakos-37881ba7](https://www.linkedin.com/in/abbie-krestakos-37881ba7)

Summary

Experienced in Marketing and Media with a demonstrated history of working in the advertising industry. Skilled in media buying & planning, advertising in traditional and digital, managing social media platforms, and working on and leading a team.

Experience

Media Buyer

RLM

Apr 2021 - Present (1 year 7 months +)

Marketing Manager

Live Nation Entertainment

Jan 2020 - Dec 2020 (1 year)

Marketing Assistant

Live Nation Entertainment

Feb 2017 - Jan 2020 (3 years)

Education

Grand Valley State University

Bachelor of Science (B.S.)

2014 - 2017

Skills

Media Buying • Media Planning • Digital Media • Google Ads • Google Suite • Leadership • Social Media Marketing • Email Marketing • Customer Service • Microsoft Office

Farissa Knox

Greater Chicago Area



farissa.knox@rlm-media.net



[linkedin.com/in/farissa-knox-5b05a711](https://www.linkedin.com/in/farissa-knox-5b05a711)

Summary

Farissa Knox is a Chicago-based author, producer and entrepreneur. Founder and CEO of RLM Media, an integrated marketing and communications advertising agency, and WhatRUWearing (WRUW) Productions, Farissa is a visionary creative executive, passionate storyteller and tastemaker.

An accomplished director and executive producer, her content and on-air appearances span NBC Chicago to Amazon Prime. In its second season, her reality show PRGirl showcases the grit and grind behind the lifestyle, fashion, and beauty sectors in the PR industry.

From writing to designing, speaking, and creative development, Farissa draws inspiration from real life with a mission to change the social narrative and empower diverse, authentic characters. Her first book, Love, Sex, and Friendship: In No Particular Order, published in early 2020, is a memoir and coming of age story dedicated to her early 20s in New York.

For over a decade, Farissa has launched and nurtured authentically diverse cultures built to thrive. A visionary executive with three powerhouse brands under her belt, her mentorship expands to internationally recognized philanthropic organizations. As a member of the Joffrey Ballet Women's Board, Chicago Urban League's IMPACT Leadership Program and Cause Strategy Partners, she serves as an advisor and advocate to empower diversity so all forms of creative artists and underserved communities can flourish.

Mother to two daughters, she is passionate about demonstrating a zero limitation mindset mentally, spiritually and emotionally every day.

Experience



Business Owner

RLM Media+ WhatRUWearing

Nov 2008 - Present (14 years +)



Founder/CEO

RLM

2008 - Present (14 years 10 months +)

RLM is a modern, full service integrated marketing and communications agency specializing in brand development, pivoting legacy brands and keeping humanity as the main ingredient.



Author of Love, Sex & Friendship: In No Particular Order

Amplify Publishing Group

Feb 2020 - Feb 2020 (1 month)

Love, Sex, and Friendship: In No Particular Order follows Farissa's personal journey of establishing a career and finding love in New York City and what her eventual journey to Chicago looked like. Her story shows again and again that there is no "right" way to navigate your 20s— it's certainly not as glamorous as it may look from the outside, but there's always humor, beauty, and wisdom to be found. She hopes Love, Sex, and Friendship both entertains and inspires readers everywhere.

Love, Sex, and Friendship: In No Particular Order is registered with the American Wholesale Book Company, Baker & Taylor, Follett Library Resources, Ingram, and Partners Book distributors and available online with the following retailers: Amazon, Books-A-Million, Barnes & Noble and Mascot Books



Adjunct Professor

Loyola University Chicago

Aug 2018 - Aug 2019 (1 year 1 month)

Professor in the Quinlan School of Business at Loyola



Founder/CEO

WhatRUWearing Productions

2014 - Aug 2018 (4 years 8 months)

WhatRUWearing Productions is the lifestyle production house behind the reality series PRGirl, now streaming on Amazon Prime Video in the US and UK. Dedicated to the art of making television series' and films based on real life (reality + scripted) for today's modern woman who loves all things fashion, beauty and lifestyle.

Education



Christopher Newport University

BS, Communications

1999 - 2003



Christopher Newport University

Bachelor's degree, Communication and Media Studies

1999 - 2003

Skills

Social Media Marketing • Social Media • Marketing Strategy • Online Advertising • Marketing Communications • Marketing • Advertising • Social Networking • Event Planning • Integrated Marketing

Therese Cebular

Chicago, Illinois, United States



therese.cebular@rlm-media.net



[linkedin.com/in/therese-cebular-b1836014](https://www.linkedin.com/in/therese-cebular-b1836014)

Experience



Vice President

RLM

Jun 2009 - Present (13 years 5 months +)

Education



Northern Illinois University

Marketing

Skills

Account Management • Marketing Strategy • Advertising • Social Media Marketing • New Business Development • Radio Advertising • Radio • Media Buying • Business Development • Digital Media

Robin Cox

Frisco, Texas, United States

robin@mediastewards.com

<https://www.mediastewards.com>

Summary

Robin's experience covers a wide variety of media disciplines. In addition to her vast TV and radio experience, she has planned and bought print, POP, digital, and out-of-home of all types in markets big and small throughout the country. A typical week finds her monitoring numerous live campaigns while negotiating future placements, auditing invoices, ensuring added value delivery, and evaluating post-buy analyses. She's a tremendously talented media professional and a great asset to our team and the clients we serve.

Nineteen years of her media career have been spent at The Ward Group. Her experience includes work on accounts such as Texas Lottery, Veterans Land Board, Hibernia National Bank, Park Place Dealerships, Pizza Hut, Six Flags, NRA, Conn's Home Plus, AT&T Midwest, Golden Corral, Little Caesar's, and most recently Sally Beauty, CareNow, Tarrant County College, Pollo Campero, On The Border and CHRISTUS Health.

Experience



Media Specialist

The Ward Group

Jan 2006 - Present (16 years 10 months +)

Assist in account management for current clients

- Responsible for research, planning, and placement of various Video (TV & online), audio (Radio and streaming), outdoor, cinema, print, and other traditional media



Media Buyer

Whitehardt

Jan 2003 - Jan 2006 (3 years 1 month)

Responsible for research and placement of various TV, radio, print and outdoor media



Media Buyer

The Ward Group

Jan 2000 - Jan 2003 (3 years 1 month)

Responsible for research and placement of various TV, radio, print and outdoor media



Media Buyer

Motion

Jan 1999 - Jan 2000 (1 year 1 month)

Responsible for research and placement of various TV, radio, print

and outdoor media



Buyers Assistant

Ackerman McQueen

Jan 1997 - Jan 1999 (2 years 1 month)

Responsible for research and
placement of various radio media

Education



University of Arkansas

Bachelor of Science, Marketing

Whitehardt, Inc

Skills

Team Management • Media Planning • Media Buying • Market Analysis • Account Management •
Negotiation

Rob Enright

Frisco, Texas, United States

rob@mediastewards.com

<https://www.mediastewards.com/>

Summary

Rob's career in media has evolved and changed much like the landscape of the industry itself. Along the way, his skills have been utilized in buying, planning, account management and new business development. He has worked with a wide range of clients including Texas Lottery, Pizza Inn, Veterans Land Board, Weir's Furniture, Schlotzsky's, Whataburger, CareNow, Golden Corral, and Popeyes, but that only scratches the surface of a long list of past and present brands he has served. In addition to a diverse set of client categories, Rob's experience has included reaching diverse ethnic groups (Anglo, Hispanic, African-American, Asian, etc.) with diverse media executions (radio, TV, outdoor, mobile, social, digital, newspaper, direct mail).

Experience



President

The Ward Group

Jan 1993 - Present (29 years 10 months +)

- Organizational management of the agency and new business development
- Oversee all client relations
- Provide strategic counsel on media planning and buying process

Education



University of North Texas

Bachelor's degree, Journalism

1988 - 1993

Bachelor's degree in Journalism; an Advertising major with a double minor in Marketing and Sociology

Skills

customer relations • media planning • new business development • organizational skills • Marketing Strategy • Attention to Detail

Honors & Awards

Rob Enright

Rob is a four-time recipient of an Award of Excellence by the DFW chapter of the Alliance for Women in Media (AWM), including the most recent 2019 award for Agency Owner of the Year.

7. SCOPE OF SERVICES

This section defines the scope of the services to be performed by the Successful Proposer as part of this RFP for Advertising Media Services.

7.1. General Description of Services and Requirements

- 7.1.1. The Successful Proposer must be able to perform the functions of an advertising media planning and buying agency, including, but not limited to, planning, buying and stewardship of broadcast, newspaper, digital, social, out-of-home media, and sponsorship activations.

We have read, understood, and will comply.

- 7.1.2. The Successful Proposer shall exhibit a thorough understanding of Texas as a minority-majority state and must demonstrate the ability to effectively reach all adult Texans (ages 18+).

We have read, understood, and will comply. Please reference our response found in 4.1.1 and the attached plan document.

7.2. Advertising Sensitivity

- 7.2.1. The Texas Lottery is an agency of the State of Texas, and all advertising efforts shall be conducted in a manner commensurate with the dignity and integrity of the State of Texas. Advertising should be consistent with the core values, mission and vision of the Texas Lottery. Further, in accordance with Tex. Gov't Code §466.110. (Prohibited Advertisements), "advertisements or promotions sponsored by the commission or the division for the lottery [must] not be of a nature that unduly influences any person to purchase a lottery ticket or number."

We have read, understood, and will comply.

- 7.2.2. Please refer to (Attachment M) for detailed sensitivity guidelines.

We have read, understood, and will comply.

7.3 Media Plan

- 7.3.1. The Texas Lottery will provide the Successful Proposer with a media strategy including planned product flights and an overall budget. The strategy shall clearly define sales and

media goals and communication objectives. The Texas Lottery and the Successful Proposer shall meet as needed to review the goals and objectives. The Texas Lottery may modify the goals and objectives at any time.

We have read, understood, and will comply.

- 7.3.2. Media Plan. The Successful Proposer shall be required to develop an annual media plan that is consistent with the Texas Lottery's sales and media goals and communication objectives and must be approved in writing by the Texas Lottery. The Texas Lottery's media plan should reach all adult Texans (ages 18+). Unless otherwise specified by the Texas Lottery, the media plan, at a minimum, must include:

- (1) Allocation of dollars by media and DMA with detailed rationale.
- (2) Projected agency fee costs.
- (3) Measurable metrics as appropriate for each medium (i.e., impressions, GRPs, etc.).
- (4) Detailed media flowchart that specifies mediums, markets and costs.
- (5) Any other topics specified by the Texas Lottery.

The media plan should be based on the Texas Lottery's fiscal year (FY) (September 1 – August 31). The Successful Proposer shall submit a media plan for FY23 no later than four weeks after the Contract execution date, or as specified by the Texas Lottery. Media plans will be due annually thereafter no later than May 31 or as specified by the Texas Lottery.

We have read, understood, and will comply. Please reference attached media flowchart and market summary document.

7.4 Budget

- 7.4.1. The level of anticipated annual FY spending will be determined by the Texas Lottery. The budget for FY 2022 and 2023 is \$10,000,000 net annually. The Successful Proposer shall develop a cost-efficient and effective media plan that is responsive to the Texas Lottery's marketing needs.

We have read, understood, and will comply.

- 7.4.2. The Successful Proposer shall make recommendations for savings wherever possible. The budget will be reviewed as needed and shall be revised as required by the Texas Lottery.

We have read, understood, and will comply.

7.4.3. The Successful Proposer shall make no commitment on behalf of the Texas Lottery without prior written approval by the Texas Lottery.

We have read, understood, and will comply.

7.5. Reports

7.5.1. The Successful Proposer shall provide the following reports to the Texas Lottery in a format approved or prescribed by the Texas Lottery. The Successful Proposer shall submit reports in accordance with the deadlines below, unless otherwise directed in writing by the Texas Lottery.

We have read, understood, and will comply.

7.5.2. The following reports are due by the 10th of each month:

- The HUB Subcontracting Plan Prime Contractor Progress Assessment Report. This report documents monthly payments made by the Successful Proposer to subcontractors under the Contract. The report may be due prior to the 10th of the month at the request of Texas Lottery.
- Approved Expenditure Report. A summary of all approved expenditures to date for the current fiscal year by media type. The summary shall indicate the total amount available in the budget and the total amount currently committed. The summary also shall include current amounts invoiced, amounts invoiced but not paid, remaining amounts committed but not invoiced, and current amounts paid.

We have read, understood, and will comply.

7.5.3. The following report is due quarterly:

- Print Audit. All newspapers must have a current compliant print audit to be eligible for consideration. No more than thirty (30) Days following the end of each quarter, the Successful Proposer shall submit quarterly print audits. Print audits will include name of publication, (paid or unpaid) circulation, DMA, year established, publication frequency, distribution sites, audit information (status, method/firm, relevant dates), as well as publisher contact information.

We have read, understood, and will comply.

7.5.4. The following report is due on an annual basis:

- Fiscal Year-End Added Value Report. The Successful Proposer shall submit a fiscal year-end summary of actual added value achieved as a result of the previous fiscal year's media buys no later than December 15 or as otherwise prescribed by the Texas Lottery.

We have read, understood, and will comply.

7.5.5. The following reports are due prior to each campaign launch as follows:

- Media Buys. For each campaign, actual media buys will be required at least three weeks prior to the start of each flight. All media buys must include a summary of planned and purchased goal metrics met, and any cost savings achieved.
- Added Value. For each campaign, the Successful Proposer shall provide an added value placement report in accordance with section 7.7.5. Reports will be required at least three weeks prior to the start of each flight with the media buys or as prescribed by the Texas Lottery.

We have read, understood, and will comply.

7.5.6. The following report is due sixty (60) Days after campaign completion as follows:

- Post Buy Report. No more than sixty (60) Days following the end of the campaign flight, the Successful Proposer shall provide the Texas Lottery with a post-buy report indicating whether the planned measurable metrics of each buy were achieved within budget. If the broadcast goals were not achieved, the report shall contain a make-good report where a bonus was issued. If the digital, social and out-of-home goals were not achieved, the report shall show savings for missed delivery.

We have read, understood, and will comply.

7.5.7. The following report is due thirty (30) Days after each sponsorship activation completion:

- Post Sponsorship Report. This report provides a recap of each sponsorship activation as prescribed by the Texas Lottery.

We have read, understood, and will comply.

7.5.8. At its sole discretion and with thirty (30) days' advance written notice to the Successful Proposer, the Texas Lottery may change the due dates of any required reports listed above. Failure to provide any reports as required (including in accordance with any revised due dates set by TLC) may result in the assessment of contract sanctions under Section 3.49.15.

We have read, understood, and will comply.

7.5.9. Ad Hoc Reports. The Texas Lottery may require the Successful Proposer to develop media reports or analysis of advertising opportunities with mutually agreed upon dates for delivery.

We have read, understood, and will comply.

7.6. Media Services

- 7.6.1. Media Buying Guidelines will be prepared by the Texas Lottery in cooperation with the Successful Proposer and shall be agreed to by both parties in writing. (See Attachment N) The Guidelines may be updated annually or more often as necessary during the term of this Contract. The Successful Proposer shall be responsible for adhering to the Media Buying Guidelines.

We have read, understood, and will comply.

- 7.6.2. Planning. The Successful Proposer shall be responsible for the planning of the media budget. Allocation will be agreed upon by both parties. Proposers are required to discuss their access to advertising research, both quantitative and qualitative, for the Texas Lottery.

We have read, understood, and will comply.

- 7.6.3. Negotiation and Placement. The Successful Proposer shall be responsible for the placement and purchase of all media, which may include broadcast, digital, social, out-of-home and newspaper media as directed by the Texas Lottery. In negotiating media purchases, the Successful Proposer shall make the Texas Lottery aware of any savings that might be achieved through long-term commitments. Media vendors shall be invoiced at net cost with no mark-up. All broadcast stations are required to have a minimum ratings criteria defined by the Texas Lottery.

We have read, understood, and will comply.

- 7.6.4. Trafficking of Media. The Successful Proposer shall be responsible for the trafficking of all creative assets to media vendors in a timely manner and adhere to all deadlines with receipt confirmation. The Successful Proposer must provide the Texas Lottery with detailed creative asset specifications in a timeline as prescribed by the Texas Lottery. The Texas Lottery will provide all creative assets.

We have read, understood, and will comply.

- 7.6.5. Stewardship. The Successful Proposer shall ensure that all media runs according to any contracts or insertion orders. This includes but is not limited to order receipt/input confirmation, traffic instruction confirmation, reviewing pre-log times, negotiating makegoods of comparable or greater value, etc.

We have read, understood, and will comply.

- 7.6.6. Placement Verification. The Successful Proposer shall review, process invoices and address any discrepancies prior to submitting to the Texas Lottery. This includes but is not limited to confirming traffic, rotation, in-geo placements, brand safety, and flight dates for the purchased media channels. In addition, the Successful Proposer shall

provide, at no cost, the Texas Lottery, affidavits, tearsheets or any other placement verification requested by the Texas Lottery.

We have read, understood, and will comply.

- 7.6.7. Added Value Media Placements. The Successful Proposer shall negotiate added value for all media included in any Texas Lottery buy. The Texas Lottery shall establish a goal for added value for each fiscal year. (See Attachment N)

We have read, understood, and will comply.

7.7. Media Evaluations

Up to fifteen (15) times per year, the Texas Lottery shall require the Successful Proposer up to provide media evaluations, an analysis of advertising opportunities with third parties, with mutually agreed upon due dates. This may include retailer co-op promotional opportunities and sponsorship activations.

We have read, understood, and will comply.

7.8. Out-Of-Home Production

Campaign billboards. The Successful Proposer shall be responsible for negotiating and contracting out-of-home billboard assets including but not limited to: vinyls, extensions, and snipes.

Jackpot billboards. The Successful Proposer shall be responsible for negotiating and contracting new and replacement out-of-home billboard assets including but not limited to: vinyls, and jackpot number box replacement or repair. In addition, the Successful Proposer will also be responsible for resolving signal failures with jackpot box vendor.

We have read, understood, and will comply.

7.9. Goods and Equipment

The Successful Proposer shall bear all storage, destruction and other costs in connection with the disposal of jackpot boxes and equipment as requested by the Texas Lottery. If needed, the Successful Proposer shall be required to provide supporting documentation confirming disposal or destruction of such items. The Successful Proposer is expressly prohibited from reproducing, distributing, displaying, performing publicly, making copies or derivative works of, selling, using, re-using or otherwise conveying to other persons or entities any goods and/or equipment bearing any Texas Lottery mark without prior written approval by an authorized Texas Lottery representative.

We have read, understood, and will comply.

7.10. Sponsorship Activations and Entitlements

7.10.1. The Texas Lottery works with the Lottery Operator to select promotional selling activations at fairs, festivals, other public events and in-store retailer promotions that create awareness and interest for Texas Lottery products among adult Texans. Sponsorship activations are intended to increase product trial and educate new and potential players about Lottery products.

We have read, understood, and will comply.

7.10.2. At the Texas Lottery's request, the Successful Proposer shall assist in selecting, developing, negotiating and contracting for sponsorship activations in support of the Texas Lottery brand and products. This may include contracted services with third-party vendors.

We have read, understood, and will comply.

7.10.3. *Free Tickets and Other Benefits.* Entitlements often carry with them an offer of free tickets to events, premium items and other special benefits. All such benefits provided in relation to sponsorship activations on behalf of the Texas Lottery shall be fully disclosed and documented. The Texas Lottery reserves the right to accept or reject the offer of any such items or benefits offered in association with an entitlement. The Successful Proposer may not utilize any such items for its own benefit or the benefit of other clients. No such item shall be provided to an employee of the Texas Lottery. The Successful Proposer shall maintain a listing of any or all items or benefits provided to the Texas Lottery and shall make a recommendation for their use. If, at the Texas Lottery's sole discretion, the Texas Lottery cannot make appropriate use of the items offered, it shall be the obligation of the Successful Proposer to negotiate lower rates or alternative benefits.

We have read, understood, and will comply.

7.11. Conventions and Meeting

Conventions and Meetings. All Texas Lottery vendors should stay current on industry trends by attending various conventions, HUB expos and related meetings. When the Successful Proposer's attendance is requested by the Texas Lottery, the Successful Proposer shall request prior written approval of actual expenses from the Texas Lottery and travel expenses will be reimbursed pursuant to Texas State per diem rates (See Section 7.14).

We have read, understood, and will comply.

7.12. Expenditure Approval

7.12.1. The Successful Proposer shall prepare written estimates for all expenditures and obtain prior written approval from the Texas Lottery before making any commitment on behalf of the Texas Lottery. The Texas Lottery will not be responsible for any expenditure

unless pre-approved in writing. The Successful Proposer shall provide at least five (5) Working Days for all estimate approvals and shall submit estimates in a format prescribed by the Texas Lottery.

We have read, understood, and will comply.

7.12.2. Estimate Revisions. Revisions to approved estimates must be pre-approved in writing by the Texas Lottery. All revised estimates shall contain the cost differential, including previous approved amounts and reason for revision.

We have read, understood, and will comply.

7.12.3. Estimate Cancellations. For any previously approved estimate that is cancelled, the Successful Proposer shall submit a revised closed estimate to the Texas Lottery.

We have read, understood, and will comply.

7.13. Billing/Invoices

7.13.1. In accordance with Section 3.8 and as further described herein, the Successful Proposer shall submit invoices to the Texas Lottery following delivery of completed services in accordance with a signed and pre-approved estimate.

We have read, understood, and will comply.

7.13.2. The Successful Proposer shall submit invoices in duplicate every other Monday, or as prescribed by the Texas Lottery, together with supporting documentation to substantiate all expenses incurred. If the designated Monday is a State holiday, invoices will be due on the next State Working Day. By submitting an invoice for payment, the Successful Proposer certifies that services have been rendered in accordance with the Contract.

We have read, understood, and will comply.

7.13.3. The Successful Proposer must include, at a minimum, or as prescribed by the Texas Lottery the following with each invoice: (i) invoice with invoice number, estimate number and any line items; flight dates; and amount; (ii) cost detail with approved estimate amount, current billed amount, amount billed to date and balance remaining; (iii) all approved estimates and revisions; and (iv) supporting documentation (e.g., vendor invoices, tearsheets, affidavits, etc.).

We have read, understood, and will comply.

7.13.4. No payment will be made without a signed and approved estimate. The Texas Lottery will only authorize payments upon the completion and acceptance of services.

We have read, understood, and will comply.

7.13.5. Estimates will be closed ninety (90) Days after the completion of the media job. Once an estimate is closed, no further billing can be submitted. The Successful Proposer is required to mark “Closed” on the final invoice submitted to the Texas Lottery for payment.

We have read, understood, and will comply.

7.13.6. The State’s fiscal year is September 1 through August 31. Any invoices submitted after August 31 for services performed during the previous fiscal year must be submitted to the Texas Lottery no later than October 30 of the immediately following fiscal year.

We have read, understood, and will comply.

7.13.7. If no final invoice is received within ninety (90) Days after the termination or expiration of the Contract, the Successful Proposer waives the right to receive any further payments.

We have read, understood, and will comply.

7.13.8. Any invoices submitted that do not have all required detail to process for payment will be disputed in accordance with Tex. Gov’t Code §2251.042 et. seq. (Disputed Payment). A disputed invoice will be processed for payment as soon as possible following settlement of dispute, but no sooner than thirty (30) Days from original invoice received date.

We have read, understood, and will comply.

7.13.9. The Successful Proposer shall be required to reimburse the Texas Lottery for any overpayment determined as a result of an audit or inspection of records on work performed under the Contract. At the Texas Lottery’s sole discretion, reimbursement may be in the form of a credit or actual payment made by the Successful Proposer.

We have read, understood, and will comply.

7.14. Travel

The Texas Lottery does not reimburse for the Successful Proposer’s travel-related expenses for regularly held meetings at Lottery Headquarters. If the TLC requires the Successful Proposer to travel, for sponsorship activation or any other reason requested by and pre-approved by the TLC, actual travel costs will be reimbursed pursuant to Texas State per diem rates. Approved travel expenses shall not be reimbursed without a prior approved estimate.

We have read, understood, and will comply.

7.15. Unacceptable Services

The Successful Proposer shall be responsible for any costs incurred in conjunction with services provided on behalf of the Texas Lottery which are deemed unacceptable due to failure to meet deadlines that warrant services unusable or rendered in a manner inconsistent with the services approved by the Texas Lottery.

We have read, understood, and will comply.

7.16. Meetings with TLC Vendors

Any meetings or conference calls that are held between the Successful Proposer and any of the Texas Lottery's vendors must be approved in advance by the Texas Lottery. Texas Lottery staff may attend any meeting or conference call the Successful Proposer and any of the Texas Lottery vendors may have.

We have read, understood, and will comply.

7.17. Media Review

The Texas Lottery, in its sole discretion, may conduct media reviews to ensure compliance with the Scope of this RFP. The Successful Proposer shall comply with any media review conducted by the Texas Lottery, or its designee.

We have read, understood, and will comply.

7.18. Other Associated Services (Offered Option)

Offered Options are not identified in this RFP but may be identified by the Proposer and included in the Proposal. This is an opportunity for Proposers to offer options the Texas Lottery may not have been aware of at the time this RFP was written. As an Offered Option, Proposers should describe in detail any other service(s) proposed to be provided to the Texas Lottery that are not specifically addressed in this RFP. The Proposer should include the cost or fee associated with an Offered Option, on a separate sheet to be included with the sealed cost proposal. The Proposer also should specify how those services would assist the Texas Lottery in achieving its objectives as outlined in this RFP.

We have read, understood, and will comply.

7.19. Office Location

The Successful Proposer is not required to maintain an office in Austin, Texas. Appropriate staff will need to be available upon request to attend meetings in person at the Texas Lottery headquarters.

We have read, understood, and will comply.

8. MEDIA RESPONSE

8.1. Media Plan Assignment

- 8.1.1. The Texas Lottery is interested in the Proposer's process and approach to resolving communication challenges. The Texas Lottery will assess the Proposer's ability to utilize qualitative and quantitative data and translate the findings into a concise media plan that is both cost efficient and effective.

Aletheia Marketing and Media was built on the foundations of Trust, Truth, and Transparency. We apply these values to everything we do including, the culture we cultivate for our employees, the relationships we build with partners, and our approach to solving our client's greatest business challenges.

We all know the Pandemic has tested the strength of our values and put undue strain on our client's operational and financial systems. The Texas Lottery Commission is no exception. We are proud of our ability to adapt to these ever-changing external factors and help our clients come out stronger on the other side of this storm. We bring these learnings to bear on our approach to the Texas Lottery Commission's biggest challenge – namely, how to effectively and efficiently engage minority majority A18+ Texans with a limited budget.

In the Media Plan Assignment Response attached, we demonstrate how we bring our unique mix of best-in-class media technology and tools, our proprietary Truth based planning methodology, and our most important resource – our people, together to achieve the Texas Lottery Commission's communication needs and business objectives.

Our engagement begins with the Truth MethodSM – our data-based media planning process that blends the qualitative and quantitative art and science of media with our decades of marketplace experience to build an effective and efficient go-to-market campaign for Texas Lottery Commission.

The four phases of this approach enable us to:

1. DISCOVER the insights that will serve as the North Star for our strategy through syndicated data collection, geo-location mapping, and qualitative research.
2. CREATE channel selection criteria and customer journey definitions for A18+ and majority-minority audiences in Texas.
3. ACTIVATE our media tactics through a combination of our marketing technology stack, direct partnerships, and HUB approved subcontractor relationships.
4. EVALUATE and optimize the performance leveraging a clearly defined measurement framework and advanced analytics models that track to the Lottery's direct business KPIs.

We are confident that our approach, our experience, and our values make us perfect partners for the Texas Lottery Commission. We have a proven track record of building data-driven go-to-market campaigns that deliver business results for our clients. Deploying our Truth MethodSM process on behalf of the Texas Lottery Commission will enable us to deliver an effective and efficient campaign that will reach 18+ Texans, engage our majority-minority audiences, and encourage trial and participation across the state of Texas.

- 8.1.2. ***Introduction.*** The Texas Lottery’s product mix consists of scratch ticket games and draw games. The Texas Lottery introduces approximately ninety (90) scratch ticket games annually ranging in price point from \$1 to \$100, which account for approximately 82% of overall Texas Lottery® sales. Draw games (Powerball®, Mega Millions®, Lotto Texas®, Cash Five®, Daily 4TM, Pick 3TM, All or NothingTM, and Texas Two Step®) range in price point from \$.50 to \$2 and account for approximately 18% of Texas Lottery sales. Several of the draw games also offer optional purchase add-on features.

We have read, understood, and will comply.

- 8.1.3. ***Advertising Media Impact.*** Past advertising campaigns have primarily supported scratch ticket families. Each scratch ticket family has large print runs and multiple tickets resulting in more market longevity and greater advertising efficiency than supporting standard individual scratch tickets. Powerball and Mega Millions draw games are promoted year-round through permanent statewide billboards. With eight (8) draw games and approximately ninety (90) scratch tickets each year, the current ad budget cannot support impactful reach for all products.

We have read, understood, and will comply.

- 8.1.4. ***The Assignment.*** Each Proposer shall create and submit as part of its Proposal, a cost efficient and effective FY 23 annual media plan that is designed to increase product awareness, trial and participation by adult (ages 18+) Texans. The media plan should detail the markets, mediums, planned goals (impressions, GRPs, etc.), and flight dates utilized to reach the intended audience. The media plan must also include agency fee costs within the allocated budget.

Considerations are as follows:

(a) Media Commitments

The following annual media commitments are required in the media plan:

- Permanent Billboards. Texas Lottery has entered into a 2-year deal with ninety- five (95) permanent billboards throughout Texas. For FY22, this dollar commitment is \$5,778,893 inclusive of both billboard media and jackpot box vendor costs.

- Newspaper. Public notice of game closings run in approximately seventy (70) newspapers across the state. These insertions run monthly and are negotiated annually. For FY22, this dollar commitment is \$166,000.

(b) Media Audience

Goal is to reach Adults 18+ Texans with a media core audience of Adults 18-49.

(c) Budget

The budget should include all media and agency fee costs and shall not exceed \$10 million.

(d) Flighting

At a minimum, flighting should include three (3) campaigns to occur September, January and May. Additional windows for campaign consideration are December and July. Texas Lottery fiscal year runs September 1 through August 31.

(e) Markets

Markets to be considered based on sales and population as well as any other factors deemed important.

We have read, understood, and will comply.

- 8.1.5. ***Evaluation of Campaign Effectiveness.*** The Texas Lottery has provided resources in Section 1.1.2 for use by Proposers in completing the Annual Media Plan assignment. Proposers are encouraged to conduct additional quantitative and qualitative analysis. The response should include media plan support as well as any examples or case studies related to the assignment. Lastly, the proposer is to provide methods used to evaluate campaign effectiveness during and/or post campaign and stewardship procedures.

We have read, understood, and will comply.



Texas Lottery Commission



Request For Proposal
For Advertising Media Services

October 28, 2022

In Greek mythology, Aletheia was the goddess of truth.

Like our namesake, Aletheia Marketing & Media is an integrated media firm built on the principles of truth, trust, and transparency.

We seek the truth of the market, your customer, and the media we use to drive your business.

We build communities of connected relationships. We connect with each other, we connect to our clients, and we connect our clients with their customers.



Our Experience

As individuals and as a company, Aletheia has a wealth of experience across a wide range of categories and industries. We pride ourselves on our ability to work with clients who have footprints regionally, nationally, and globally.

Norwex®

FRIENDLY GRAINS



LALA

SCOUT & CELLAR
CLEAN-CRAFTED COMMITMENT



aptera



ON THE
BORDER



TaxAct



GRIFOLS



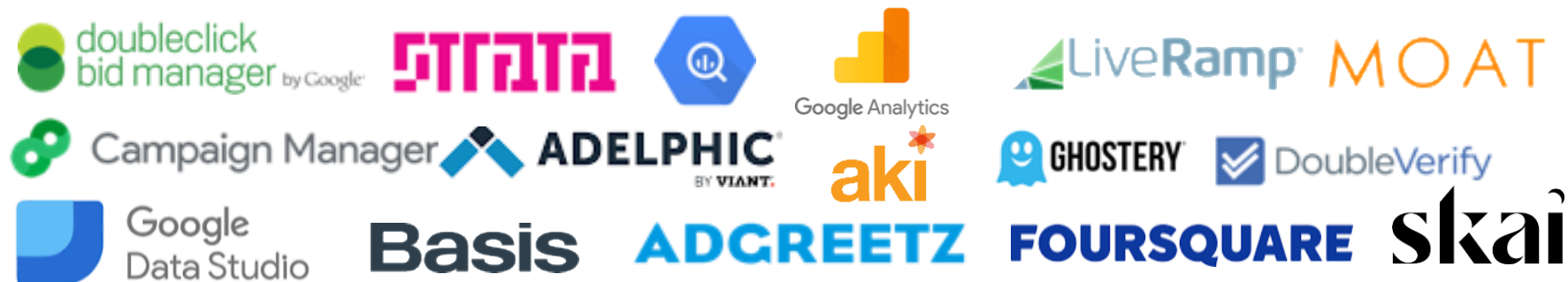
Intelligent Tools + Resources

We leverage a variety of best-in-class quantitative and qualitative media research tools and resources, which will help us build effective media plans on behalf of the Texas Lottery Commission.

BUSINESS INTELLIGENCE SUITE



EXECUTION + OPTIMIZATION



Media Capabilities



STRATEGY

- Business Assessment
- Zenzi™ Values Research
- Customer Journey Mapping
- Market Research
- Strategy Development
- Digital Transformation



MEDIA PLANNING & BUYING

- Digital Video/OTT/CTV
- Digital Audio/Podcast
- Programmatic
- Influencers
- Social Media
- SEM/SEO
- HyprTarget™ Local Marketing
- Broadcast TV
- OOH/Print
- Radio



BUSINESS INTELLIGENCE

- Measurement & Attribution
- Social Listening
- Wisdom™ Data Warehousing
- Analytics & Optimization
- Results Tracking & Benchmarking
- Predictive Modeling

As a full-service integrated media firm, we bring a robust set of strategic capabilities that allow us to efficiently and effectively execute media campaigns on behalf of Texas Lottery Commission.

The Truth Method™

Building media campaigns that connect...

Fueled by smart media tech and driven by your business objectives, our data-based approach blends the art and science to marketing.

Discover



Business assessment, strategy and recommendations

Moment of Truth™

Create



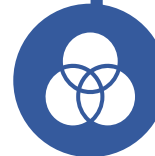
Design media & marketing plan

Activate



Launch go-to-market media tactics

Evaluate



Outline measurement, optimization and reporting

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TEXAS LOTTERY

Discover

Aletheia and our partners understand that the state of Texas is unique in so many ways.

The multi-layered diversity of our statewide population requires that our paid media strategy acknowledges race, language, culture and geography from a nuanced perspective while allowing for mass reach across the state as well.



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The Lottery Player



The Texas Lottery participation rate was 45.2% in 2020.

Key Demographics

Based on Past-Player Profile

Participation was on a downward trend for the last two decades.

- Rates were 64.0% in 1993, 56.0% in 2003, and 36.5% in 2013.
- 2020 was 3.2pts higher than 2018.

Age 35-44 sweet spot

Participation rates are highest with this cohort, but there is opportunity to grow with younger players

HH Income \$75K+

39.2% of past-year players with a 54.6% participation rate

HH Composition 52% Married

Likely have children under 18 in the home

Diversity 29.3% are Hispanic

Hispanics show higher monthly median spend (\$46)

Media Habits

Based on Lottery Playing HHs

Video 36 hours weekly (linear TV)

83% stream each week

Audio 17 hours weekly (terrestrial radio)

55% streaming

25% listen to podcasts

Online 30 hours weekly

Primary Device: Mobile/Tablet

Secondary Device: Home Computer

Social 84% visit weekly

Top reach platform is Facebook/IG

Other Interests and Activities Over-index for trivia games, bingo, card games, online games and fantasy sports

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Campaign Timing & Channels

Heavier flights and major activations will be focused on the key windows of September 2023, January 2024, and May 2024 when new scratcher offerings are typically launched. Other channels will serve as always-on, baseline support throughout the fiscal year.

Build Awareness / Trial

- Broadcast and Event Activations, Digital, and Committed Media
Dallas, Houston, Harlingen, Beaumont, El Paso, Amarillo, Lubbock, Laredo
- Digital and Committed Media
Sherman-Ada, Shreveport, Wichita Falls

Drive Frequency / Add-On

- Digital and Committed Media
Abilene, Austin, Corpus Christi, Odessa, San Angelo, San Antonio, Tyler, Victoria and Waco

Multicultural Reach

Texas is a booming market. After gaining nearly 4MM new residents over the last decade, it continues to pull from diverse and Hispanic-dense states including California, Florida, and Arizona. Ensuring that the FY24 plan speaks to the state's majority-minority Hispanic and Black/AA audiences is non-negotiable.

Hispanic/Latinos in TX

2022 Pop +29% from 2010 census

Will represent 13.3MM (42%) of
Total Pop by 2027

Top Hispanic Penetration DMAs (above 40%)

Corpus Christi, El Paso, Harlingen, Laredo,
Lubbock, Odessa, San Angelo, San Antonio
and Victoria

Black/AA in TX

2022 Pop +4% from 2010 census

Will represent 4.0MM (13%) of
Total Pop by 2027

Top Black/AA Penetration DMAs (above 12-13%)

Beaumont, Dallas, Houston, Tyler and Waco

Important Channels

- Spot Cable (Black/AA)
- Online/Streaming Video
- Terrestrial and Streaming Audio
- Paid Social

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Create + Activate

Growth opportunities based on Texas Lottery sales and population density, population diversity, and geographic location factor into media investment by market. Each market is unique, therefore, our ***Texas Unique Approach*** supplements the statewide mass reach of media like Broadcast TV with Cable, OTT, and Digital that can narrow in on the interests, culture, and languages unique to the specific regions and markets of Texas.



Channel Summary

We recognize the lottery category has some restrictions and sensitivities around targeting. As such, we are committed to adhering to the TLC media guidelines laid out in Attachments M and N, along with the TLC Advertising Sensitivity Guidelines, as they relate to paid media.

We will work with the TLC team to ensure the media support is inclusive of appropriate draw, ticket, and scratcher game messaging rotations as budget allows.

Committed Channels Existing Contracts to be Managed

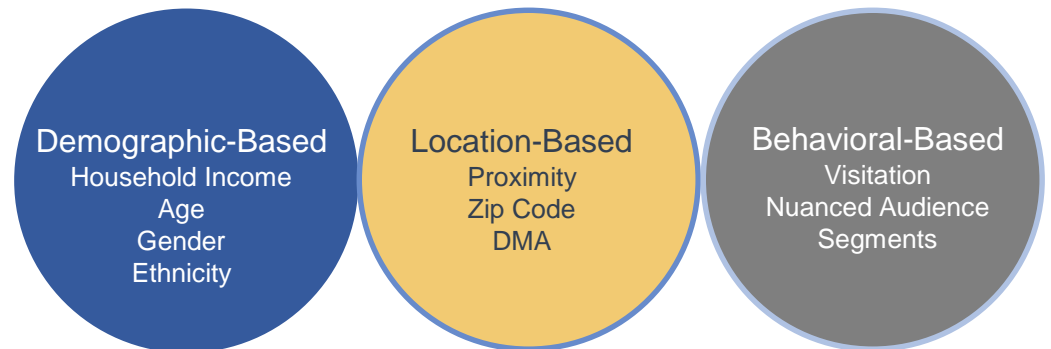
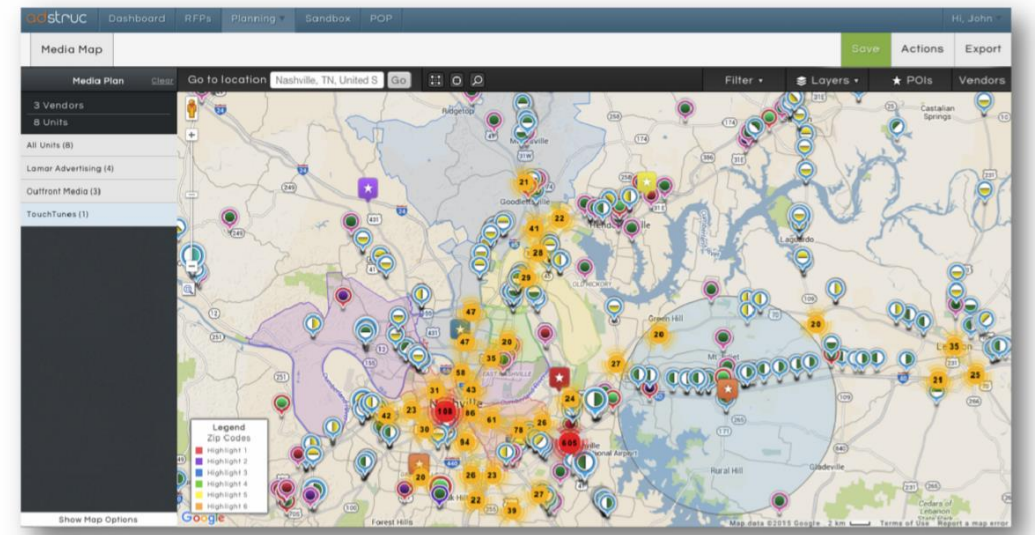
- Out of Home (OOH)
- Newspaper

Recommended Channels Additional Paid Tactics and Partners

- Additional Digital Out of Home
- Video (Linear and Digital/Streaming)
- Audio (Terrestrial and Digital/Streaming)
- Programmatic Digital
- Paid Social
- Sponsorship Activation

Out of Home Management

Our team will manage all aspects of the OOH process for the existing 95 board commitment. We have long-standing relationships with the best OOH suppliers, from the national vendors down to the mom-and-pop providers throughout Texas. This team brings many years of experience managing the Sunshine boards. We can also provide best-in-class mapping to easily see how inventory is distributed within key geographic areas. The software we use merges 1P data, geography, and available inventory to determine the most effective locations.



Digital OOH

TEXAS
LOTTERY



To complement the current TLC OOH commitments, we recommend tapping into our digital OOH inventory that can be placed programmatically through our Demand Side Platform (DSP) Adelphic. Inventory through traditional billboard providers such as Lamar, Outfront, and Clear Channel can be targeted as well as unique properties like Firefly (mobile boards), Captivate (elevator), Accent Health (doctor offices), CURB (taxi), TopGolf (entertainment), Pospots (grocery), GSTV (gas station).

popspots



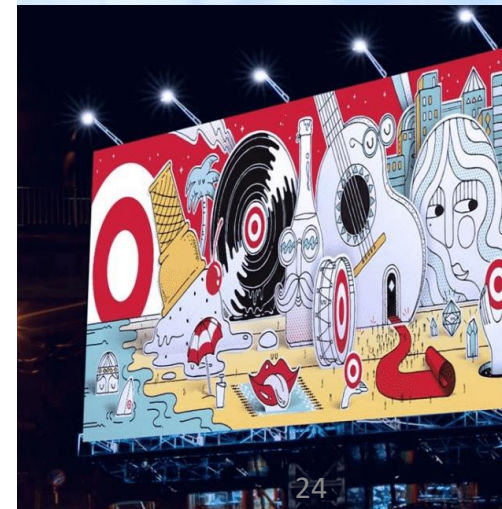
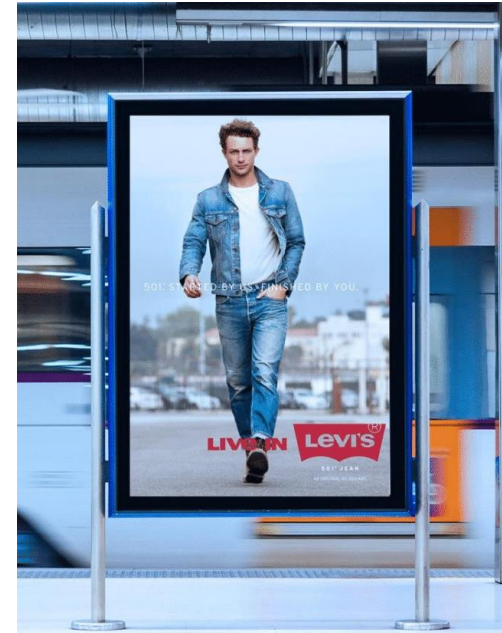
OUTFRONT

Audience and Geography

- Geo Targeting Focused zips within DMAs
- Demo A18+

Media and Activation Opportunities

- Target inventory in high-density Hispanic zip codes in Corpus Christi, El Paso, San Antonio, San Angelo, Laredo, and Lubbock
- Provide retailer-specific coverage utilizing Popspots and GSTV for grocery store and gas station advertising
- Opportunity for advanced measurement with sales lift studies



Print Media Management

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LOTTERY



Our team will provide stewardship over already existing print contracts, including legal notices placed with newspapers across the state.

- Confirmation of contracts
- Reconcile monthly statements for rate verification
- Require monthly electronic tear sheets as POP
- Circulation verification through ABC or SRDS on a semi-annual basis as data is released



In broadcast channels, we will always take into special consideration any on-air personality and/or content sensitivity.

A combination of local television and radio offers excellent branding and awareness-building in our Grow and Under-Performer markets. A layer of Spot Cable is recommended for additional impact in high-density Black/AA markets.

Local TV

- 4-week flights: September, January and May
- Purchase targeted dayparts and programming
- Run with a mix of :30 (65%) and :15 (35%) units
- Deliver a minimum of 75 GRPs weekly in Broadcast, 50 GRPs weekly in targeted Spot Cable
- Negotiate added value :05 and :10 second news billboard sponsorships to enhance the brand awareness

Local Radio

- 4-week flights: September, January and May
- Run with a mix of :60 and :30 creative
- Balanced daypart mix determined by market
- Deliver a minimum of 100 GRPs weekly on main buy
- Purchase top-rated stations in all markets, which would include Hispanic and Black/AA stations to ensure we are reaching all our consumers
- Look to negotiate DJ partnerships

Digital Video: YouTube



The average American spends at least 30 minutes each day with YouTube, representing nearly 20% of all time spent with digital video. YouTube also over-indexes for multicultural audiences looking beyond traditional TV for more representation. In fact, Hispanic and Black viewers account for 33% of YouTube's viewer share (eMarketer, 2022).

Strategy

Our campaigns will be awareness-focused to drive traffic to the Texas Lottery website via a “Learn More” call-to-action (CTA) and be broken out by draw games and scratcher family.

- **Geo** Texas (All markets but weighted by DMA)
- **Age** A18+ but YouTube will skew 18-49
- **Creative** Mix of :15 and :30 videos with in-stream and bumper ads to showcase games and scratchers
- **Contextual Ads** Use targeted keywords like "lottery tickets" to ensure TLC shows up in relevant searches

Digital Video: Canela TV

Canela Media is ranked as the third largest Hispanic ad-focused company and the only female and minority-owned certified digital company in the US. Offering free and culturally-relevant programming in Spanish and English, Canela is recommended as the best over-the-top (OTT) option to build reach with younger, bilingual Hispanics.



Strategy

- **Geo** Mix of Awareness and highly Hispanic-penetrated DMAs (Corpus Christi, El Paso, Harlingen, Laredo, Lubbock, Odessa, San Angelo, San Antonio and Victoria – explore zip targeting in Dallas and Houston)
- **Age** A18+
- **Creative** Mix of :06, :15 and :30 videos as well as on-screen overlay
- **Contextual Sensitivity** Manage content adjacency with partner to align with TLC sensitivities and buy guidelines

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Pandora reaches nearly 5MM Texans with audio ads designed to engage non-obtrusively across mobile devices, desktop, or even in the car. In fact, if Pandora were a terrestrial radio station, it would be the #1 rated station in ALL Texas DMAs, according to MRI-Simmons.

Strategy

- **Geo** Texas (All markets weighted by DMA)
- **Age** 18+, leveraging the Pandora “Lottery and Sweepstakes Enthusiasts” listener audience
- **Creative** Mix of digital audio, digital video, and companion display banners

Recommendations

- **Sponsored Listening** Users who watch TLC ad unlock limited access to Pandora Premium
- **ROS Digital Audio** :15 audio ads across Pandora stations and devices aimed at reaching 18+ Texans
- **Multicultural** Target DMAs with high-density Hispanic and African American populations along with over-indexing genres

Spotify is the most-used digital audio service by Hispanic Adults. By utilizing Spotify's self-serve platform, Ad Studio, we can economically reach this important majority-minority Texas audience as well Black/AA Texans.

Strategy

- **Geo** Zip targeting in core DMAs, focused on areas of high Hispanic and Black concentrations
- **Age** 18+
- **Creative** Mix of digital audio and video, :30 seconds or less

Recommendations

- **Advanced Targeting** Interests (ex. podcasts and playlists) and Fan Base (artist-based)
- **Genres** Regional Mexican, Hip Hop, Reggae, Rock, Blues, Latin, R&B, House

Facebook + Instagram



Facebook and Instagram reaches more than 22 million Texans 18+. We will leverage Campaign Budget Optimized (CBO) enabled campaigns to maximize audience scale to raise awareness and drive trial.

Audience Strategy

- **Geo** Texas (All markets weighted by DMA and separated by objective [see flowchart])
- **Age** 18+
- **Audience Network** Excluded
- **Creative** Mix of video, carousel, and static ads to showcase multiple draw game and scratch ticket options

Secondary Considerations

Traffic Objective campaigns will supplement Awareness Objective campaigns in order to drive users to the Texas Lottery website to find more information on available games and how to play.

Sponsorship: iHeart Media

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iHeartMedia reaches 8.7MM (39.5%) of adults in Texas. iHeart also owns some of the biggest and most anticipated music events of the year and can deliver awareness and buzz for the Texas Lottery.

Audience and Geography

- Adults 18+ (with 18-49 skew)
- Media covering top sales markets Dallas, Houston, San Antonio, Austin and Waco

Media

- Local Station Takeover of iHeart TX stations (pre-roll video and high-impact display)
- Cross-platform streaming audio across the iHeart Audience Network (geo and demo targeted, dynamic ad insertion, English and Spanish language creative)

Sponsorship Activation

- Focus on iHeartCountry Festival in May
 - Engage on-the-ground at the Daytime Village with festival freebies, VIP viewing sponsorship and surprise ticket upgrades
 - Own a 10-day countdown to the event through special on-air segments with host Bobby Bones
- Custom on-air, digital integration, brand activation spaces and promotional flyaway integrations available for both events



May 2024, Austin



December 2023, Dallas

Quality Control and Pass-Through



For digital, we include IAB Standard Terms and Conditions v3.0 in all vendor insertion orders and contracts, leverage Double Verify within programmatic to ensure brand safety and limit ad fraud, and use Google Campaign Manager to audit impression delivery.

Trafficking

Extreme Reach

Extreme Reach is a tech platform for video ad campaign workflow that delivers ads across screens and devices. This partner allows us to integrate linear TV and video ad serving in one platform.

Adswerve

Adswerve is a third-party reseller of Google Campaign Manager (GCM), the ad server we use to serve creative tags and report on digital ad impressions for most of our digital channels. GCM will allow us to ensure digital creative is trafficked appropriately and to audit impression delivery.

Additional Data and Tech Partners

Foursquare

Foursquare is one of the largest geolocation-based data providers in the world. This hyperlocal data will allow us to target prospective Lottery customers based on which retailers they frequently visit. Geo-fencing gas stations and supermarkets where Texas Lottery games and scratch tickets are available provides digital efficiencies. This partner also provides physical traffic measurement for media to retailer locations.



Budget

Please see separate Flowchart Attachment for details on flighting, channels, and impressions.

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Evaluate

Being good stewards of the Texas Lottery Commission budget not only means treating your money as if it were our own, but also ensuring those dollars are generating business results.

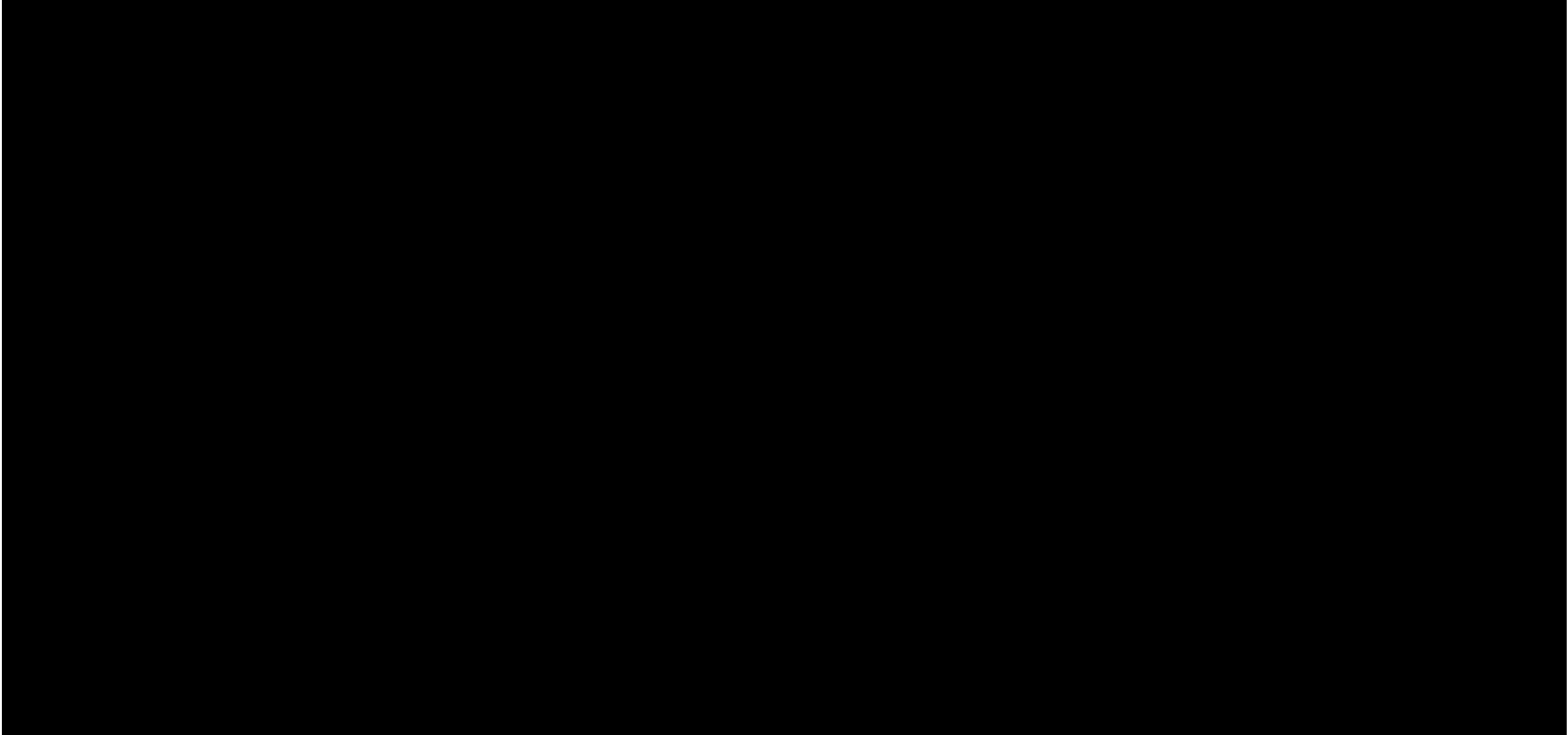
The Evaluate phase of our Truth MethodSM is an ongoing process that occurs throughout the campaign.

The machine learning and AI deployed across digital platforms, along with manual optimizations made based on actionable insights derived from active performance tracking, ensures KPIs are met.





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Billing/Invoicing Transparency

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Truth & Transparency

Overall, our invoice process is simple. Prior to any media spending we submit a “Client Approval to Buy” this authorizes us to spend money on your behalf. Once that is received, we move forward with campaigns.

We then proceed with the billing. Prior to getting started, we work through the points below to ensure that we have a customized outline of what is needed for Texas State Lottery Accounts Payable.

- Confirm billing date that you prefer to receive invoices i.e. Mid-Month, First of Month
- Customize based on the data that the Texas State Lottery AP team needs to see on our invoices
- Add and GL or PO codes to associate invoicing with specific budgets or jobs
- Outline details of time spent, media placed, and pass-through costs.

As a point of difference, we do not mark up ad serving, ad technology or other related costs, these are passed through to Texas State Lottery with **no mark up**.

A sample invoice from Aletheia Marketing & Media. The invoice is titled 'Invoice' and includes the company logo and name. It lists the client as 'TV-1-173' and provides the invoice date (1/15/2020) and due date (2/14/2020). The invoice details include the estimate number (100), date range (1/27/2020 - 2/23/2020), job number (20), and CATB# (20001). The main body of the invoice is a table with two columns: 'DESCRIPTION' and 'AMOUNT DUE'. The table lists various media spots and their associated costs, including Colorado Springs and Dallas-Ft. Worth markets. The total amount due is \$13,352.16.

DESCRIPTION	AMOUNT DUE
COLORADO SPRINGS	
0607 COMCAST, Colorado Springs East,-Cable	\$917.06
0608 COMCAST, Colorado Springs North-Cable	\$492.75
0609 COMCAST, Colorado Springs South-Cable	\$403.78
KKTV-TV	\$3,166.38
KOAA-TV	\$2,691.88
KRDO-TV	\$3,681.94
KXRM-TV	\$1,998.38
MARKET TOTAL	\$13,352.16
DALLAS-FT. WORTH	
5334 SPECTRUM, Dallas-Ft Worth Int.,-Cable	\$13,103.50
KDAF-TV	\$4,462.13
KDFI-TV	\$2,445.50
KDFW-TV	\$30,386.25

Billing/Invoicing Transparency

TEXAS
LOTTERY



Invoice

Invoice #: D-1111
Invoice Date: 4/15/2020
Due Date: 5/15/2020

Dallas, TX 75240

Estimate: 174 [REDACTED] 2020 2Q Core Mobile Display
Date Range: 5/1/2020 - 5/31/2020
Job Number: 20 [REDACTED] 174
CATB#: [REDACTED] 20017

AD SERVING AND
DATA FEES WITH
NO MARKUP

DESCRIPTION	AMOUNT DUE
ADSWERVE	\$36.95
BASIS	\$2,463.05
NET AMOUNT	\$2,500.00
TOTAL TAX	\$0.00
TOTAL AMOUNT	\$2,500.00



Why Aletheia and Relevant Client Work

WHY SHOULD YOU WANT TO WORK WITH US?

WE DRIVE BUSINESS



Proven track record of delivering business results for our clients

WE ARE AGILE



Our size is our strength – we are nimble yet powerful

OUR INTELLIGENCE



We invest in technology and data like Zenzi but our greatest resource is our people

OUR TRANSPARENCY



We are in the service business and believe in building high-touch relationships based in truth

OUR IMPACT



Our marketplace experience and deep relationships unlock powerful media opportunities and scale for our clients

Promised Land Dairy

CHALLENGE:

Promised Land is a beloved brand with a strong Texas heritage. To drink Promised Land milk is to love it. Ad budgets are, however, lower than the brand's major competitors (Organic Valley, Horizon Organic, TruMoo, DairyPure). Finding a high-impact opportunity for sampling and interaction was the client's goal.

APPROACH:

We brought Promised Land to the biggest event in Texas. The Texas State Fair was much anticipated after its 2020 cancellation and served as the perfect place to get the brand back into the hands of Texas families.

In addition to placing sampling teams on-the-ground at dedicated, branded booths at the fair, Promised Land was an official Competition Kitchen sponsor with product placement and sponsorship in three Kids Can Cook events. With paid support, we sent local expert and influencer @Dallasdiscovered to the fair. This post promoted a Fall Giveaway, fair passes and \$50 to spend at the fair, as well as the Kids Can Cook sponsorship. Engagement was nearly 2X the campaign benchmark and the post garnered over 1K likes!

RESULTS



Exposure to 2.2MM State Fair visitors in 2021

8,106 samples and 4,950 premiums distributed over 17 days

Digital reach to 3.2MM unique visitors and 5,864 pages views as listed sponsor on the BigTex.com site

I could have an entire bottle with breakfast

On The Border

CHALLENGE:

Drive on-premise sales for a Mexican food chain—in a cluttered casual-dining landscape—that was under the impression it could not afford effective television media weights.

APPROACH:

By implementing efficient broadcast buying strategies and adding over-the-top (OTT) television we extended reach in many of the brand's key markets on a channel they didn't think they could afford.

We began by performing an in-depth Brand Development Index (BDI) analysis of all On The Border DMAs. Locations were tiered based on BDI to help us identify the most efficient and impactful markets for investment. BDI data was also leveraged to identify where to best supplement TV investment digitally. Digital video like YouTube and OTT was placed in markets where TV weight was lower. In addition, we worked closely with BRDGE, the client's CRM partner, to match point-of-sale data to customer behavior and craft audience segments for more advanced digital targeting and message sequencing.



RESULTS



Immediate 5% sales lift across all markets against category

Evergreen Power Solutions

CHALLENGE:

Evergreen Power Solutions is a subscription-based service designed to help members find the lowest electricity rates. Evergreen wanted to increase brand awareness among an affluent, high-income target audience within DFW to drive an increase in membership count.

Despite the brand awareness KPI, Evergreen did not have a very large media budget. Our task was to generate enough brand awareness to move the needle on membership count without the ability to target a mass audience.

APPROACH:

With limited funds to quickly test and learn, we took a flighted approach, alternating bi-monthly between digital media (paid social & PPC) and Advanced TV (Hulu & various full-episode player). Part of our strategy was to be ready to shift budget to whichever medium seemed to be corresponding with lift in online signups, which proved to be Advanced TV.

RESULTS



Evergreen experienced a YOY lift of 31% in online customer signups pre- and post-media activation



Staggering YOY growth in online signups of 106% specifically in Q1 2021



557,032 impressions served on premium Advanced TV inventory at an efficient CPM of \$30.10

Veterans Land Board

CHALLENGE:

The Texas Veterans Land Board sought to generate demand for its land loan program and set out to improve business processes and develop strategies to boost adoption of the VLB programs.

APPROACH:

Our goal was to invest media dollars where we could have the most impact possible on veterans in Texas. Veteran population composition, land availability and historical purchase activity were factors carefully considered. Based on the research, we decided to add Houston to the list of core markets that had previously received paid media support - Austin, Dallas, Killeen-Temple, San Antonio and Waco.

Our media plan included increased digital advertising statewide complimented by cable TV, radio and outdoor bulletins. We expanded VLB's television and outdoor advertising efforts to include Houston. To offset the costs associated with advertising in Houston, we reduced the overall broadcast media budget while increasing more cost-effective digital platforms such as paid search, social and email marketing.

RESULTS



11% YOY Increase in Applications

There was a year-over-year increase in applications for land loans of 11%, or 3,091 more applications.



9% YOY Increase in Land Loans

VLB closed 1,202 land loans, a 9% year-over-year increase



328 Loan Applicants in One Month

A marketing promotion held in January generated 328 new land loan applications -- a record-breaking number for that month.

Aletheia Marketing Media, LLC
FY23 Plan by DMA Summary

Channel and Total Estimated Impressions Summary by DMA

Nielsen Designated Market Area	Channels	Specific Multicultural Support	Total Estimated Impressions
Abilene-Sweetwater, TX	OOH, Newspaper, YouTube, Pandora, Programmatic Display, Paid Social		1,699,713
Amarillo, TX	OOH, Newspaper, Broadcast TV, YouTube, Programmatic Video, Pandora, Spot Radio, Programmatic Display, Paid Social,		8,821,749
Austin, TX	OOH, Newspaper, YouTube, Pandora, Programmatic Display, Paid Social, Event Activation		17,788,146
Beaumont-Port Arthur, TX	OOH, Newspaper, Broadcast TV, Spot Cable, YouTube, Programmatic Video, Pandora, Spot Radio, Programmatic Display, Paid Social	Yes	9,296,227
Corpus Christi, TX	OOH, Newspaper, YouTube, Hispanic OTT, Pandora, Spot Radio, Spotify Multicultural, Programmatic Display, Paid Social	Yes	7,674,026
Dallas-Ft. Worth, TX	OOH, Newspaper, YouTube, Programmatic Video, Pandora, Spot Radio, Programmatic Display, Paid Social, Event Activation		72,950,755
El Paso et al, TX-NM	OOH, Newspaper, Broadcast TV, YouTube, Programmatic Video, Hispanic OTT, Pandora, Spot Radio, Spotify Multicultural, Programmatic Display, Paid Social, Event Activation	Yes	24,252,203
Harlingen et al, TX	OOH, Newspaper, Broadcast TV, YouTube, Programmatic Video, Hispanic OTT, Pandora, Spot Radio, Spotify Multicultural, Programmatic Display, Paid Social	Yes	28,599,315
Houston, TX	OOH, Newspaper, YouTube, Programmatic Video, Pandora, Spot Radio, Spotify Multicultural, Programmatic Display, Paid Social, Event Activation	Yes	67,876,352
Laredo, TX	OOH, Newspaper, Broadcast TV, YouTube, Programmatic Video, Hispanic OTT, Pandora, Spot Radio, Spotify Multicultural, Programmatic Display, Paid Social	Yes	5,743,182
Lubbock, TX	OOH, Newspaper, Broadcast TV, YouTube, Programmatic Video, Hispanic OTT, Pandora, Spot Radio, Spotify Multicultural, Programmatic Display, Paid Social	Yes	9,960,283
Odessa-Midland, TX	OOH, Newspaper, YouTube, Hispanic OTT, Pandora, Spot Radio, Spotify Multicultural, Programmatic Display, Paid Social	Yes	5,500,203
San Angelo, TX	OOH, Newspaper, YouTube, Hispanic OTT, Pandora, Spot Radio, Spotify Multicultural, Programmatic Display, Paid Social	Yes	1,924,456
San Antonio, TX	OOH, Newspaper, YouTube, Hispanic OTT, Pandora, Spot Radio, Spotify Multicultural, Programmatic Display, Paid Social	Yes	36,939,338
Sherman-Ada, TX-OK	OOH, Newspaper, YouTube, Programmatic Video, Pandora, Programmatic Display, Paid Social		823,117
Shreveport, LA	OOH, Newspaper, YouTube, Programmatic Video, Pandora, Programmatic Display, Paid Social		1,569,004
Tyler-Longview et al, TX	OOH, Newspaper, Spot Cable, YouTube, Pandora, Spot Radio, Programmatic Display, Paid Social	Yes	9,634,120
Victoria, TX	OOH, Newspaper, YouTube, Pandora, Programmatic Display, Paid Social		483,415
Waco-Temple-Bryan, TX	OOH, Newspaper, Spot Cable, YouTube, Pandora, Spot Radio, Programmatic Display, Paid Social, Event Activation	Yes	12,790,085
Wichita FIs et al, TX-OK	OOH, Newspaper, YouTube, Programmatic Video, Pandora, Programmatic Display, Paid Social		1,228,219
20		12	325,553,907

PROPOSER'S COMMITTMENT





**ATTACHMENT A
PROPOSER'S COMMITMENT**

I hereby commit ALETHEA MARKETING & MEDIA LLC
(Company Name)

to provide the goods and services described in the attached Proposal for Advertising Media Services required by the Request for Proposals for the Texas Lottery Commission.

Signature: [Handwritten Signature]

Title: CEO

Date: 2-18-2022

HUB PARTICIPATION





ATTACHMENT C HUB SUBCONTRACTING PLAN

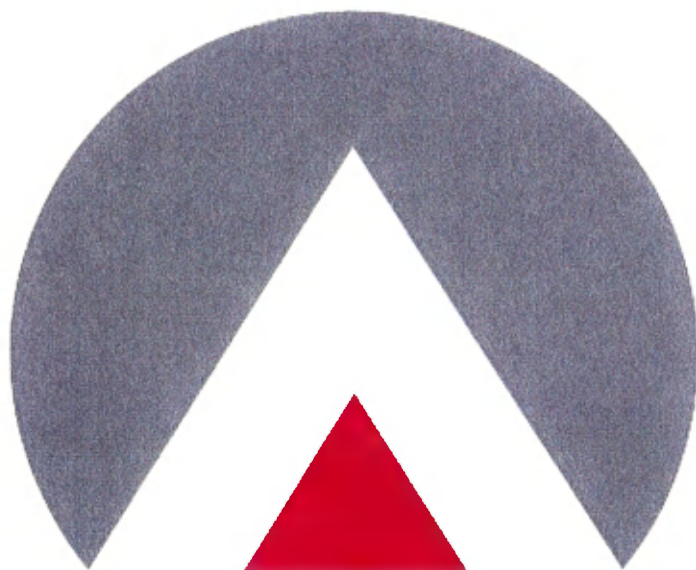
TEXAS LOTTERY COMMISSION

HUB/HSP

For Advertising Media Services

No: 362-2023-0002

Response from:



ALETHEIA

MARKETING & MEDIA

October 28, 2022



5. HISTORICALLY UNDERUTILIZED BUSINESS (HUB) PARTICIPATION

5.1. HUB Requirement

The Texas Lottery has adopted the rules promulgated by the Comptroller of Public Accounts (CPA) regarding Historically Underutilized Businesses (HUBs) in 34 Texas Administrative Code (TAC) §§ 20.281 – 20.298 (See [http://texreg.sos.state.tx.us/public/readtac\\$ext.ViewTAC?tac_view=5&ti=34&pt=1&ch=20&sch=D&div=1&rl=Y](http://texreg.sos.state.tx.us/public/readtac$ext.ViewTAC?tac_view=5&ti=34&pt=1&ch=20&sch=D&div=1&rl=Y)). By submitting a Proposal, the Proposer certifies that it has reviewed 34 TAC §§ 20.281 - 20.298. Rule 20.285 addresses the specific requirements of Historically Underutilized Business subcontracting plans (HSPs).

We have read, understood, and will comply.

5.2 HSP Submission and Texas Lottery Review

5.2.1. All proposals must include an HSP (Attachment C, including Method A or B, if applicable) in the format required by the CPA. Proposers may access the HSP forms on-line at the following CPA website link: <https://www.comptroller.texas.gov/purchasing/vendor/hub/forms.php>. The forms must be printed, signed and submitted with your Proposal. The HSP is a pass/fail requirement. PROPOSALS THAT DO NOT INCLUDE A COMPLETED HUB SUBCONTRACTING PLAN PREPARED IN ACCORDANCE WITH 34 TAC §20.285 SHALL BE REJECTED AND WILL NOT BE EVALUATED.


We have read, understood, and will comply.

5.2.2. The HSP form is provided in Attachment C of this RFP. To determine whether a Proposer has performed a good faith effort in preparing its HSP as required by the CPA's HUB rules, the Texas Lottery may request clarifications, if necessary. The HSP will be reviewed based on the Proposer's submission and any clarifications requested by the agency.

We have read, understood, and will comply.

5.3. Assistance for Preparation of HSP

5.3.1. *Pre-Proposal Conference.* Proposers are encouraged to attend the pre-Proposal conference, which will include a brief overview of the HSP requirements. Proposers may ask questions at the pre-Proposal conference regarding the HSP. A copy of the TLC's Pre-Bid/Proposal Conference Booklet regarding HSP requirements is available on the agency's website at:




http://www.txlottery.com/export/sites/lottery/About_Us/Doing_Business_with_TLC/Procurement/ Proposers should review the HSP booklet thoroughly to ensure they fill out and submit all forms correctly.

We have read, understood, and will comply.

5.3.2 *HSP Quick Check List and HUB Subcontracting Opportunity Notification Form*. Attached to this RFP are an HSP Quick Check List (Attachment C-1) prepared by the CPA and a HUB Subcontracting Opportunity Notification Form (Attachment C-2). Attachment C-1 is intended to assist Proposers in preparing the HSP forms but is not required to be submitted with Proposals. Proposers are encouraged to use Attachment C-2 when sending notice of subcontracting opportunities.


We have read, understood, and will comply.

5.3.3 *Additional TLC Assistance*. As stated above, if an HSP is rejected, the Proposal will be disqualified and will not be considered. **Therefore, Proposers are strongly encouraged to start preparing HSP forms as soon as possible and take advantage of the following TLC assistance. Please note there are deadlines associated with this process and Proposers have a limited amount of time to cure any deficiencies.**

- 
- Written questions regarding the HSP can be submitted at any time up until the Proposal deadline. The TLC will compile and post a separate HSP question-and-answer document on the TLC website. The document will be updated as questions are submitted. It is the Proposer's responsibility to check the TLC website for this information.
 - The TLC will conduct one-on-one HSP workshops with Proposers upon request. The workshops will cover detailed information on how to complete the HSP forms. Workshops must be concluded by the date and time listed in the Schedule of Events. Workshops due to gathering restrictions may be conducted via Zoom, TEAMS or telephone conference. Proposers are responsible for contacting the Texas Lottery to schedule a workshop during the specified time period. Proposers may schedule a workshop up until the final date listed in the Schedule of Events.
 - The TLC will review and provide individual written feedback on draft HSP forms submitted by Proposers. Draft HSP forms must be submitted by the date and time listed in the Schedule of Events. Upon request, the TLC may also provide verbal feedback.

Note that "draft HSP forms" consist only of the forms included in Attachments C, C-1 and C-2 of the RFP and documentation related to performance of the good faith effort. In reviewing draft forms, the TLC will not comment on responses to any other sections of the RFP, even if they are referred to in the HSP forms. Proposers are instructed not to submit any other portions of their Proposal to the TLC as part of the draft HSP.

One-on-one workshops and the TLC's review of draft HSP forms do not guarantee that the HSP submitted with the Proposal will pass.



We have read, understood, and will comply.

5.4. Requirements for Completing the HSP Forms

5.4.1. TLC's HUB Participation Goal. The goods and/or services requested in this RFP are classified in the category of Other Services Contracts. The agency's HUB participation goal for this RFP is 24.30%.

We have read, understood, and will comply.

5.4.2. Requirements of the HUB subcontracting plan. Each Proposer shall complete the HSP forms prescribed by the CPA (Attachment C) and provide the following:

- a. a certification the Proposer has made a good faith effort to meet the requirements of 34 TAC § 20.285;
- b. the names of the subcontractors that will be used during the course of the Contract;
- c. the expected percentage of work to be subcontracted; and
- d. the approximate dollar value of that percentage of work.

Each Proposer shall provide all documentation required by the agency to demonstrate the Proposer's compliance with the good faith effort requirements prior to Contract Award. If a Proposer fails to provide supporting documentation (phone logs, fax transmittals, electronic mail, etc.) by the deadline specified by the agency, the Proposal shall be rejected for material failure to comply with Tex. Gov't Code §2161.252 (b).

We have read, understood, and will comply.

5.4.3. Proposer Intends to Subcontract

Proposers who intend to subcontract any portion of the Contract must indicate in the HSP form that they intend to subcontract, and must perform one of the three good faith effort methods identified below.

- **Method A (1): Using 100% HUB Subcontractors.** Proposer will use only Texas- certified HUBs for all identified subcontracting opportunities.
- **Method A (2): Meeting the Specified HUB Contract Goal.** Proposer will meet the HUB contract goal by using only Texas-certified HUBs with whom the Proposer has contracted for five years or less.
- **Method B: Good Faith Effort Outreach.** Proposer will perform good faith effort outreach for each identified subcontracting opportunity by contacting at least three Texas-certified HUBs and two trade organizations or development centers that serve members of the HUB groups. **Proposers using this method must perform the outreach even for areas where a Proposer has a pre-existing subcontracting relationship.**

PROPOSERS WHO INTEND TO SUBCONTRACT, AT A MINIMUM, MUST USE ONE OF THE METHODS OUTLINED ABOVE. FAILURE TO DO SO WILL RESULT IN DISQUALIFICATION.

We have read, understood, and will comply.

5.4.4. Proposer Does Not Intend to Subcontract

Proposers who intend to fulfill the entire Contract using only their own existing resources and employees, without subcontracting, should check the appropriate box in Section 2 of the HSP form and complete Sections 3 and 4 of the form.

The Proposer must explain how all functions of the Contract will be performed without the use of Subcontractors and should refer to Section 3 of the HSP form.

We have read, understood, and will comply.

5.5. Subcontracting Opportunities

5.5.1. The Texas Lottery has identified the following potential subcontracting opportunities under this RFP. Proposers intending to subcontract any must perform the good faith effort detailed in the HSP instructions and include a compliant HSP with the Proposal.

CLASS 559: MASS TRANSPORTATION, RAIL VEHICLE PARTS AND ACCESSORIES

Item Numbers and Commodity Descriptions:

559-70 Signage: Destination, Routing and Advertising

CLASS 801: SIGNS, SIGN MATERIALS, SIGN MAKING EQUIPMENT, AND RELATED SUPPLIES

Item Numbers and Commodity Descriptions:

801-58 Signs: Billboard, Advertising, etc.

CLASS 915: COMMUNICATIONS AND MEDIA RELATED SERVICES

Item Numbers and Commodity Descriptions:

915-01 Advertising Agency Services

915-04 Advertising Services, Outdoor Billboard, etc.

915-10 Advertising, Digital

915-59 Mail Services, Express

915-71 Newspaper and Publication Advertising, Non-legal

CLASS 918: CONSULTING SERVICES

Item Numbers and Commodity Descriptions:

918-07 Advertising Consulting

918-76 Marketing Consulting

CLASS 920: DATA PROCESSING, COMPUTER, PROGRAMMING, AND SOFTWARE SERVICES

Item Numbers and Commodity Descriptions:

920-28 Emergency Back-up, Disaster Recovery Services and Facilities for Data Processing

CLASS 958: MANAGEMENT AND OPERATION SERVICES (NOT OTHERWISE CLASSIFIED)

Item Numbers and Commodity Descriptions:

958-84 Social Media Management Services

CLASS 961: MISCELLANEOUS SERVICES, NO. 1 (NOT OTHERWISE CLASSIFIED)

Item Numbers and Commodity Descriptions:

961-49 Legal Services, Attorneys

961-66 Sign Making and Painting Services

CLASS 962: MISCELLANEOUS SERVICES, NO. 2 (NOT OTHERWISE CLASSIFIED)

Item Numbers and Commodity Descriptions:

962-24 Courier/Delivery Services, Including Air Courier Services)

962-86 Transportation of Goods, Shipping and Handling, and Other Freight Services

CLASS 971: REAL PROPERTY RENTAL OR LEASE

Item Numbers and Commodity Descriptions:

971-70 Storage Space Rental or Lease

We have read, understood, and will comply.

5.5.2. The potential subcontracting opportunities listed above may or may not be areas that a Proposer would subcontract, depending on that Proposer's existing resources, employees, and business model. Further, Proposers are not limited to the list above, and may identify additional areas of subcontracting. Proposers who intend to subcontract are responsible for identifying all areas that will be subcontracted and shall submit a completed HSP demonstrating evidence of good faith effort in developing that plan.

We have read, understood, and will comply.

5.5.3. A list of HUB vendors registered with the CPA for the subcontracting opportunities identified above is included under the HUB/CMBL tab of this RFP. This list is provided as a resource to assist Proposers in preparing and submitting an HSP. The Texas Lottery Commission does not endorse, recommend or attest to the capabilities of any company or individual listed. Note that currently active certified HUBs will have a status code of "A." All other status codes indicate that a vendor is inactive or not a HUB.

We have read, understood, and will comply.

5.5.4. Please refer to the HUB/CMBL Directory Instructions and HUB Vendor Reference Lists under the HUB/CMBL tab of this RFP to locate potential HUB Subcontractors.

We have read, understood, and will comply.

5.6. Post-Contract Award

5.6.1. Notification of Subcontractors

Following Contract Award, the Successful Proposer must provide notice to all subcontractors (HUBs and Non-HUBs) of their selection for the awarded Contract. The Successful Proposer is also required to provide a copy of each notice to the agency's HUB Coordinator for the Contract no later than ten (10) Working Days after the Contract is awarded. Proposers should refer to Section 4 of the HSP form for additional information about this requirement.

We have read, understood, and will comply.

5.6.2. HSP Changes

Following Contract Award, any proposed changes to the HSP must be submitted, in writing, by the Successful Proposer to the Texas Lottery for prior review and must be approved by the Texas Lottery in writing before becoming effective under the Contract.

We have read, understood, and will comply.

5.6.3. HSP Reporting

Following Contract Award, if the Successful Proposer is subcontracting, the Successful Proposer shall maintain business records documenting compliance with the HSP and shall submit a monthly compliance report in the format required by the Texas Lottery. The monthly compliance report shall be submitted to the Texas Lottery by the 10th of the following month or on the date requested by the agency's HUB Coordinator or his/her designee. The submission of the monthly compliance report is required as a condition of payment

We have read, understood, and will comply.



ATTACHMENT C
HUB SUBCONTRACTING PLAN

HUB PARTICIPATION





ATTACHMENT C
HUB SUBCONTRACTING PLAN

BACKGROUND INFORMATION





**ATTACHMENT D-1
BACKGROUND INFORMATION CERTIFICATION**

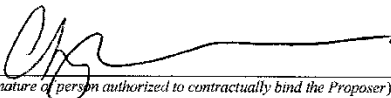
Texas Government Code §466.155

Under Texas Government Code §466.103, the Executive Director of the Texas Lottery Commission may not award a contract for the purchase or lease of facilities, goods or services related to lottery operations to a person who would be denied a license as a sales agent under Texas Government Code §466.155.

ALETHEIA MARKETING 4 MEDIA LLC

(Company Name)

certifies that it has reviewed Texas Government Code §466.155 and that it would not be denied a license as a sales agent under said section.


(signature of person authorized to contractually bind the Proposer)

CHRIS SCHIEMKE
(printed name)

CEO
(title)

2-18-2022
(date)