State of California—Health and Human Services Agency
California Department of Public Health

KAREN L. SMITH, MD, MPH
Director & State Health Officer

EDMUND G. BROWN JR.
Governor

Solicitation
18-10215 California Adult Tobacco Survey

10/25/2018

You are invited to review and respond to this Solicitation, entitled California Adult Tobacco Survey, 18-10215. The anticipated term of this contract is 3 years with the option to amend for a one (1) additional two (2) year term extension. In submitting your bid, you must comply with the instructions found herein.

Note that all agreements entered into with the State of California will include by reference General Terms and Conditions and Contractor Certification Clauses that may be viewed and downloaded at: http://www.dgs.ca.gov/ols/Resources/StandardContractLanguage.aspx

If you do not have Internet access, a hard copy can be provided by contacting the person listed below.

In the opinion of Department of Public Health (CDPH), this Solicitation is complete and without need of explanation. However, if you have questions, or should you need any clarifying information, the contact person for this Solicitation is:

California Department of Public Health
Attn: Robert Bell, Procurement Manager
California Tobacco Control Program
MS 7206
1616 Capitol Avenue
Sacramento, CA 95814
Phone: 916-449-5492 Fax: 916-449-5055
Email address: Robert.Bell@cdph.ca.gov

Please note that no *verbal* information given will be binding upon the State unless such information is issued in writing as an official addendum.

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A) PURPOSE AND DESCRIPTION OF SERVICES

1. Purpose

The California Department of Public Health (CDPH), California Tobacco Control Program (CTCP), is soliciting bids from qualified bidders to provide data collection services for a population-based health survey. The survey is to be fielded to a probability-based online panel of California residents that is maintained by the contractor or the contractor's independent consultant(s) and/or subcontractor(s). The data shall be representative of California residents ages 18 to 64.

The California Tobacco Control Program intends to make a single contract award to the most responsive and responsible firm offering the lowest cost.

This procurement is exempt from Part II, Division II, (commencing with Section 10100), of California Public Contract Code.

2. Description of Services

Bids must address and Contractors agree to provide all of the services described below.

a. Contractor shall utilize an existing probability-based online panel that has been used in peer-reviewed publications. The maintenance of the existing panel shall be conducted by the contractor, including independent consultant(s) and/or subcontractor(s). Respondents to the panel shall answer a set of standard pre-screening demographic questions to establish survey eligibility. A list of minimum pre-screening demographic questions to be asked of respondents can be found in Attachment 12: Sample Pre-Screening Questions. If similarly worded questions to that of Attachment 12 are already asked to the existing panel, Contractor may use their existing question wording or response options that differs from that of Attachment 12.

b. Contractor shall draw a sample of at least 3,000 eligible respondents, representative of California residents ages 18 to age 64, from the probability-based online panel for each survey cycle. Contractor shall also meet the following additional sampling targets for each cycle:

   i. 300 non-Hispanic African American/Black respondents;
   ii. 300 respondents that meet the low socioeconomic status definition, defined as having (1) a high school education or less, and (2) household income below 185 percent of the Federal Poverty Level; and
   iii. 500 respondents that meet the current smoker definition, defined as (1) ever smoked 100 cigarettes, and (2) currently smoke either "some days" or "everyday".

   Contractor may utilize opt-in respondents to meet these sampling targets.

c. Contractor shall provide three hours of technical assistance every calendar year to CDPH/CTCP on survey question wording, survey question layout, survey formatting, survey question translations from English to Spanish, and any other aspects of survey design related to the survey instrument. Contractor will be provided the survey instrument by CDPH/CTCP that assesses behaviors, awareness, and attitudes of tobacco use and tobacco policies. The survey will be approximately 120 questions in length (median time of 20 minutes), excluding the required pre-screening demographic questions used to determine survey eligibility.

d. Contractor shall conduct two survey waves annually, approximately six months apart, for a total of six survey waves for the three-year term of the agreement. At its sole discretion, CDPH/CTCP shall have the option to provide additional funding for an additional two-year term extension pending funding availability and satisfactory progress reports as described in Section A.2.g. If a two-year extension is approved by the CDPH/CTCP, the Contractor shall conduct four additional survey waves (two survey waves annually). The survey instrument from a previous iteration of the California Adult Tobacco Survey, with a median time of approximately 20 minutes, can be found in Attachment 13: Sample Survey Questionnaire. Contractor shall perform the following services each survey wave:

   i. Conduct a pre-test/pilot prior to fielding the main survey;
   ii. Field both the English-language and Spanish-language survey online to the probability-based online panel described in Section A.2.a;
   iii. Meet the sampling targets described in Section A.2.b in a twelve-week data collection timeframe; and
   iv. Provide weekly updates to CDPH/CTCP regarding survey completion when survey is in the field.

e. Contractor shall conduct the first survey wave within three months of contract execution.

f. Contractor shall submit to CDPH/CTCP the survey methodology documentation and cleaned SPSS or SAS data file with appropriate survey weight that incorporates (1) the probability of selection, and (2) benchmarks to the U.S. Census Current Population Survey. The cleaned SPSS or SAS data file should contain all survey data having complete variables and value labels and shall be submitted to CDPH/CTCP by the following dates:

   i. Wave 1: June 30, 2019
   ii. Wave 2: December 31, 2019
   iii. Wave 3: June 30, 2020
   iv. Wave 4: December 31, 2020
   v. Wave 5: June 30, 2021
   vi. Wave 6: December 31, 2021

   *vii. **Wave 7: June 30, 2022*
   *viii. **Wave 8: December 30, 2022*
   *ix. **Wave 9: June 30, 2023*
   *x. **Wave 10: December 29, 2023*

g. Contractor shall submit to CDPH/CTCP progress reports. The progress reports are due to CDPH/CTCP by the following dates:

   i. First Interim Progress Report: July 31, 2019
   ii. Second Interim Progress Report: July 31, 2020
   iii. Third Interim Progress Report: August 2, 2021
   iv. Comprehensive Progress Report: December 31, 2021

   *v. **Fourth Interim Progress Report: August 1, 2022*
   *vi. **Fifth Interim Progress Report: July 31, 2023*
   *vii. **Comprehensive Progress Report: December 29, 2023*

** Due dates for deliverables if the CDPH/CTCP approves the option to provide additional funding and a two-year term extension as described in Section A.2.d.

B) BIDDER MINIMUM QUALIFICATIONS

The following minimum requirements refer to the actual person(s) who will be conducting the above mentioned services. Responses must contain all requested information and conform to the format described in this section. It is the Bidders responsibility to provide all necessary information for the State to evaluate the response, verify requested information, and determine the Bidders ability to perform the tasks and activities as defined in Section A.2. Please supply enough detail to clearly establish that the Bidders meet the minimum qualifications listed below:

Number	Qualification
1	Bidder must provide a response in detail to clearly establish that bidder, including independent consultant(s) and subcontractor(s), have the ability to conduct the services detailed in Section A.2.
2	Bidder's personnel must have three or more years of the following experience: (a) recruiting and/or maintaining a probability-based online panel, (b) experience in survey methodology, including sampling, weighting, and benchmarking, which will allow data to be representative of a specific target population, and (c) experience in fielding survey instruments online. All experience must have occurred within the past five years.
3	Bidder must provide copies of resumes for each major professional staff person hired or assigned to perform work under the resulting contract, including independent consultant(s) and subcontractor(s).
4	Bidder must provide three (3) references from projects of similar size and scope.
5	Bidder must certify that the bidder is in good standing, fiscally stable, and qualified to conduct business with the State of California.
6	Non-profit entity bidder must certify their eligibility to claim non-profit status.
7	Bidder, including independent consultant(s) and subcontractor(s), must certify that no conflict of interest with tobacco, electronic cigarette, or related industries exists (see Attachment 14 Certification of Non-Acceptance of Tobacco Funds). If conflict exists, the bidder must provide additional clarification and documentation regarding the nature and extent of the conflict of interest, which, upon CDPH's review and discretion, is determined to satisfy the requirement to protect CDPH from a potential tobacco industry or related conflict of interest. Because of the complexities involved in defining potential conflict of interest with the mission of CDPH, CDPH reserves the right to request further information. If the additional clarification and documentation do not, at CDPH's sole discretion, satisfy CDPH's requirement for protection from a potential conflict of interest, the bidder will be notified in writing and will be disqualified.

C) BID REQUIREMENTS AND INFORMATION

1. Key Action Dates

It is recognized that time is of the essence. All bidders are hereby advised of the following schedule and will be expected to adhere to the required dates and times.

Key Action Dates	Date(s)	Time
Release Date of Solicitation	10/25/2018	8:00 AM
Pre-Bid Webinar	11/02/2018	10:00-12:00 PM

Questions Due	11/06/2018	5:00 PM
Question/Answer Summary Posted	11/08/2018	5:00 PM
Mandatory Letter of Intent Due	11/13/2018	5:00 PM
Bid Due Date	11/30/2018	5:00 PM
Notice of Intent to Award	12/05/2018	8:00 AM
Anticipated Contract Start Date	01/01/2019	8:00 AM

2. Submission of Bid

a. All bids must be submitted electronically via Online Tobacco Information System (OTIS). Dates and times shown in Section C, Bid Requirements and Information, Item 1, Key Action Dates. Access to OTIS will be granted to all bidders once official letter of intent has been submitted to California Tobacco Control Program (CTCP). Instructions on how to apply for new users can be found here: https://tcfor.catcp.org/opportunities/trainingMaterials/NewApplicants.mp4 Instructions for bidders who already have an OTIS account can be found here: https://tcfor.catcp.org/opportunities/trainingMaterials/AccountUsers.mp4

b. All bids shall include the documents identified in this Solicitation as Required Attachment Checklist (see page 14). Bids not including the proper "required attachments" shall be deemed non-responsive. A non-responsive bid is one that does not meet the basic bid requirements. A blank copy of all documents will be available for download via OTIS and required to be uploaded through OTIS in the additional documents section of the electronic bid.

c. All documents requiring a signature must bear an original signature of a person authorized to bind the bidding firm.

d. Bids must be submitted for the performance of all the services described herein. Any deviation from the work specifications will not be considered and will cause a bid to be rejected.

e. A bid may be rejected if it is conditional or incomplete, or if it contains any alterations of form or other irregularities of any kind. The State may reject any or all bids and may waive an immaterial deviation in a bid. The State's waiver of immaterial deviation shall in no way modify the Solicitation document or excuse the bidder from full compliance with all requirements if awarded the agreement.

h. Costs for developing bids and in anticipation of award of the agreement are entirely the responsibility of the bidder and shall not be charged to the State of California.

i. An individual who is authorized to bind the bidder contractually shall sign the Bid/Bidder Certification meet. The signature should indicate the title or position that the individual holds in the firm. An unsigned bid may be rejected.

j. A bidder may modify a bid after its submission by withdrawing its original bid and resubmitting a new bid prior to the bid submission deadline. Bidder modifications offered in any other manner, oral or written, will not be considered.

k. A bidder may withdraw its bid by submitting a written withdrawal request to the State, signed by the bidder or an authorized agent. A bidder may thereafter submit a new bid prior

to the bid submission deadline. Bids may not be withdrawn without cause subsequent to bid submission deadline.

l. The awarding agency may modify the Solicitation prior to the date fixed for submission of bids by the issuance of an addendum to all parties who received a bid package.

m. The awarding agency reserves the right to reject all bids. The agency is not required to award an agreement.

n. Before submitting a response to this solicitation, bidders should review, correct all errors and confirm compliance with the Solicitation requirements.

o. Where applicable, bidder should carefully examine work sites and specifications. Bidder shall investigate conditions, character, and quality of surface or subsurface materials or obstacles that might be encountered. No additions or increases to the agreement amount will be made due to a lack of careful examination of work sites and specifications.

p. The State does not accept alternate contract language from a prospective contractor. A bid with such language will be considered a counter proposal and will be rejected. The State's General Terms and Conditions (GTC) are not negotiable. The GTC may be viewed at Internet site www.dgs.ca.gov/contracts.

q. No oral understanding or agreement shall be binding on either party.

r. Bidder must complete and submit to the awarding agency the Payee Data Record (STD 204), to determine if the Contractor is subject to state income tax withholding pursuant to California Revenue and Taxation Code Sections 18662 and 26131. This form can be found on the Internet at http://www.documents.dgs.ca.gov/dgs/fmc/pdf/std204.pdf under the heading STANDARD FORMS; select "Forms Search", and enter the form number "204". No payment shall be made unless a completed STD 204 has been returned to the awarding agency.

s. Bidder must sign and submit to the awarding agency, *page one (1)* of the Contractor Certification Clauses (CCC), which can be found on the Internet at: http://www.dgs.ca.gov/LinkClick.aspx?fileticket=5vWwqTeMoHk%3d&tabid=6133&portalid=32&mid=10104.

3. Evaluation and Selection

a. At the time of bid opening, each bid will be checked for the presence or absence of required information in conformance with the submission requirements of this Solicitation.

b. The State will evaluate each bid to determine its responsiveness to the published requirements.

c. Bids that contain false or misleading statements, or which provide references that do not support an attribute or condition claimed by the bidder, may be rejected.

d. Award if made, will be to the lowest responsive responsible bidder.

e. In the event of a tie score, the award will be determined by a coin toss. The coin toss will be held in the State Agency's headquarters area office. This is a public event, which the bidders will be invited to attend. The selection of the Contractor will be at the sole discretion of the State.

4. Award and Appeal

a. Notice of intent to Award shall be posted on the TCFOR website at: https://tcfor.catcp.org/. If any proposer would have been awarded the contract had CDPH/CTCP correctly applied the evaluation standard in the Solicitation, or if CDPH/CTCP followed the evaluation and scoring methods in the Solicitation, the contract shall not be awarded until either the appeal has been withdrawn or CDPH has decided the matter. It is suggested that appeals are submitted by certified or registered mail. Only those submitting a Proposal consistent with the requirements of this Solicitation and are not awarded a contract may appeal. No awarded proposer may appeal the contract award funding amount.

b. The proposer may appeal the award decision. The intent to Appeal Letter is due by 5:00 p.m. on the date listed in the Key Action Dates. The proposer shall file a detailed statement specifying the grounds for the appeal and send the appeal letter to:

U.S. Mail	**Courier** (e.g., FedEx)
Caroline Peck, MD, MPH, FACOG, Chief Chronic Disease and Injury Control Division California Department of Public Health MS 7206 P.O. Box 997377 Sacramento, CA 95899-7377 Phone: (916) 449-5500	Caroline Peck, MD, MPH, FACOG, Chief Chronic Disease and Injury Control Division California Department of Public Health MS 7206 1616 Capitol Avenue, Suite 74.516 Sacramento, CA 95814 Phone: (916) 449-5500

c. At the sole discretion of the Division Chief, or his/her designee, a hearing may be held. The decision of the Division Chief, or his/her designee shall be final. There is no further administrative appeal. Applicants will be notified of decisions regarding the appeal in writing within fifteen (15) working days of the hearing date or the consideration of the written material submitted, if no hearing is conducted.

d. Upon resolution of any appeal and subsequent award of the contract, Contractors will be required to complete and submit to CDPH/CTCP:

i. The Payee Data Record (STD 204), to determine if the Contractor is subject to state income tax withholding pursuant to California Revenue and Taxation.

ii. Code Section 18662 and 26131. This form can be found on the internet at https://www.documents.dgs.ca.gov/dgs/fmc/pdf/std204.pdf. No payment shall be made unless a completed STD 204 has been returned to CDPH/CTCP.

iii. Page one (1) of the Contractor Certification Clauses (CCC), at http://www.dgs.ca.gov/ols/Resources/StandardContractLanguage.aspx

iv. Evidence of $1,000,000 commercial general liability insurance or a certification of self- insurance signed by the authority to bind the proposer

v. Proposer Documentation Requirements

e. One award will be made to the responsible proposer earning with the lowest total cost bid.

5. Disposition of Bids

   a. Upon bid submission, all documents submitted in response to this Solicitation will become the property of the State of California, and will be regarded as public records under the California Public Records Act (Government Code Section 6250 et seq.) and subject to review by the public.

6. Agreement Execution and Performance

   a. Performance shall start no later than the express date set by the awarding agency and the Contractor, after all approvals have been obtained and the agreement is fully executed. Should the Contractor fail to commence work at the agreed upon time, the awarding agency, upon five (5) days written notice to the Contractor, reserves the right to terminate the agreement. In addition, the Contractor shall be liable to the State for the difference between Contractor's bid price and the actual cost of performing work by the second lowest bidder or by another contractor.

   b. All performance under the agreement shall be completed on or before the termination date of the agreement.

D) BUSINESS PARTICIPATION PROGRAM REQUIREMENTS

The DVBE Program requirement for this solicitation has been waived; however, the DVBE Incentive still applies.

Disabled Veteran Business Enterprise (DVBE) Incentive

In accordance with section 999.5(a) of the Military and Veterans Code, an incentive will be given to bidders who exceed the DVBE program requirement. For evaluation purposes only, the State shall apply an incentive to bids that propose California certified DVBE participation as identified on the Bidder Declaration GSPD-05-105 and confirmed by the State. The incentive amount for awards based on low price will vary in conjunction with the percentage of DVBE participation.

The following incentive award will apply. Incentive points will be applied to the non-cost points section for evaluation purposes.

Confirmed DVBE Participation of:	DVBE Incentive
5% or Over	5%
2% to 2.99% Inclusive	3%
1% to 1.99% Inclusive	1%

For awards based on low price, the net bid price of responsive bids will be reduced (for evaluation purposes only) by the amount of DVBE incentive as applied to the lowest responsive net bid price. If the lowest responsive, responsible bid is a California certified small business, the only bidders eligible for the incentive will be California certified small businesses.

An explanation of the Disabled Veteran Business Enterprise (DVBE) Program Incentive can be found at the Internet web site http://www.pd.dgs.ca.gov/dvbe/dvbeincentive.

1. Commercially Useful Function

Only State of California, Office of Small Business and DVBE Services (OSDS) certified DVBEs who perform a commercially useful function relevant to this solicitation, may be used to satisfy the DVBE program requirements. Bidders are to verify each DVBE subcontractor's certification with OSDS to ensure DVBE eligibility.

Definition of Commercially Useful Function: California Code of Regulations, Title 2, § 1896.61(l) The term "DVBE contractor, subcontractor or supplier" means any person or entity that satisfies the ownership (or management) and control requirements of §1896.61(f); is certified in accordance with §1896.70; and provides services or goods that contribute to the fulfillment of the contract requirements by performing a commercially useful function.

As defined in MVC §999, a person or an entity is deemed to perform a "commercially useful function" if a person or entity does all of the following:

- Is responsible for the execution of a distinct element of the work of the contract.
- Carries out the obligation by actually performing, managing, or supervising the work involved.
- Performs work that is normal for its business services and functions.
- Is responsible, with respect to products, inventories, materials and supplies required for the contract, for negotiating price, determining quality and quantity, ordering, installing, if applicable and making payment.
- Is not further subcontracting a portion of the work that is greater than that expected to be subcontracted by normal industry practices.

A contractor, subcontractor, or supplier will not be considered to perform a commercially useful function if the contractor's, subcontractor's, or supplier's role is limited to that of an extra participant in a transaction, contract, or project through which funds are passed in order to obtain the appearance of disabled veteran business enterprise DVBE participation.

The CDPH Advocates listed herein may be contacted to provide assistance in identifying DVBE vendors that may perform a commercially useful function applicable to the scope of this solicitation.

2. Declaration Forms

Complete the Bidder Declaration GSPD-05-105 and include it with the bid response. When completing the declaration, bidders must identify all subcontractors proposed for participation in the contract. Bidders awarded a contract are contractually obligated to use the subcontractors for the corresponding work identified unless the State agrees to a substitution and it is incorporated by amendment to the contract. This form is located at http://www.documents.dgs.ca.gov/pd/poliproc/MASTER-BidDeclar08-09.pdf

At the State's option prior to award, bidders may be required to submit additional written clarifying information. Failure to submit the requested written information as specified may be grounds for bid rejection.

3. CDPH SB/DVBE Advocate

CDPH Small Business and Disabled Veteran Business Enterprise (SB/DVBE) Advocates are available to answer questions regarding the SB/DVBE Programs and Incentives and to help

identify possible SB/DVBE vendors. If you need additional information, contact:

SB/DVBE CDPH Advocate
SBDVBE@cdph.ca.gov

E) PREFERENCE PROGRAMS

The following Preference Programs can be applied for qualifying bidders.

1. Small Business/Non-Small Business Bid Preference

   Certified small businesses or microbusinesses can claim the 5% preference when submitting a bid on a State contract. A non-small business may receive a preference of 5% if the business commits to subcontract at least 25% of its net bid price with one or more small businesses or microbusinesses. The 5% preference is used only for computation purposes to determine the winning bidder and does not alter the amounts of the resulting contract. The value of the preference is limited to $50,000 when a contract award is based upon award to the lowest compliant bid. A contract awarded on the basis of the 5% preference is awarded to the small business, microbusiness or non-small business for the actual amount of its bid. For additional information go to http://www.dgs.ca.gov/pd/Programs/OSDS.aspx

2. Target Area Contract Preference Act (TACPA), if applicable

   Promotes economic development and employment opportunities in designated distressed areas, by offering bidding preferences in specified state contracts.
   For more information: http://www.documents.dgs.ca.gov/pd/poliproc/tacpapage.pdf

F) SUBCONTRACTORS

All subcontractors identified in the bid, must be experts in their field and capable of performing the tasks for which they are hired to do. If awarded the agreement, the Contractor must identify all of the SB/MB and must be identified in the Bidder's submission of Attachments Bid Form Budget Detailed Worksheet and should also reference back to the activities being performed in Section A.2.

The CDPH reserves the right to approve substitutions of subcontractors, as long as, certified business participation levels remain unchanged.

G) REQUIRED ATTACHMENTS

Refer to the following pages for additional Required Attachments that are a part of this solicitation.

Attachment 1

Cost Proposal for the funding period of 01/01/19 – 12/31/21

Evaluation Contractor and Proposed Subcontractors

List your organization in the Contractor field under Agency Name. List known Subcontractors by name in the Subcontractor field(s) under Agency Name. If you plan to subcontract any portion of the Scope of Work but have not identified an agency, indicate TBD (to be determined) in place of the name. List the fully loaded costs to complete each of the specified Surveys (two per year) for each fiscal year. Budget is not to exceed $300,000 in any 12 month period.

SERVICE	AGENCY NAME	BUDGET 1 01/01/19-06/30/19	BUDGET 2 07/01/19-06/30/20	BUDGET 3 07/01/20-06/30/21	BUDGET 4 07/01/21-12/31/21
Planning, Design, and Development					
Contractor		$	$	$	$
Subcontractor #1		$	$	$	$
Subcontractor #2		$	$	$	$
Subcontractor #3		$	$	$	$
Survey Administration and Implementation					
Contractor		$	$	$	$
Subcontractor #1		$	$	$	$
Subcontractor #2		$	$	$	$
Subcontractor #3		$	$	$	$
Data Analysis and Reporting					
Contractor		$	$	$	$
Subcontractor #1		$	$	$	$
Subcontractor #2		$	$	$	$
Subcontractor #3		$	$	$	$
TOTAL Costs per above		$	$	$	$

Bidder Acknowledgment / Certification

The Bidder hereby certifies that the price(s)/rate(s) offered on this Bid Form are true and accurate to the best of the Bidder's knowledge.

The Bidder agrees that the price(s)/rate(s) offered herein shall remain in effect until CDPH awards the agreement and throughout the duration of the agreement. Any cost over runs or increases in services, if allowed, shall be billed at the price(s)/rate(s) stated for the appropriate budget period. Contract extensions, if any, shall be billed at the price(s)/rate(s) stated for the last budget period/year if more than one budget period/year is shown.

The Bidder further understands that the above quoted rate(s) must include all of the Bidders costs including operating expenses, labor, service call charges, diagnostic fees/estimates, transportation/travel costs, mileage or per diem expenses, equipment costs, supplies, annual inflation costs/rate adjustments, profit margin, etc. By submitting this Bid Form the Bidder hereby claims its willingness to certify to and comply with all requirements and terms and conditions cited in this Solicitation and any attachment thereto.

The Bidder understands that its bid response will become a public document and will be open to public inspection.

Bidder's Signature	**Date signed**
Printed/typed name	**Title**

Attachment 2

Additional Cost Proposal for Potential Funding Opportunity*

*At its sole discretion, CDPH shall have the option to provide additional funding for an additional two years of surveys. To be eligible for the additional funding opportunity, Bidders must complete and submit an Additional Cost Proposal.

Evaluation Contractor and Proposed Subcontractors

List your organization in the Contractor field under Agency Name. List known Subcontractors by name in the Subcontractor field(s) under Agency Name. If you plan to subcontract any portion of the Scope of Work but have not identified an agency, indicate TBD (to be determined) in place of the name. List the fully loaded costs to complete each of the specified Surveys (two per year) for each fiscal year. Budget is not to exceed $300,000 in any 12 month period.

SERVICE	AGENCY NAME	BUDGET 1 01/01/22-06/30/22	BUDGET 2 07/01/22-06/30/23	BUDGET 3 07/01/23-12/31/23	
Planning, Design, and Development					
Contractor		$	$	$	$
Subcontractor #1		$	$	$	$
Subcontractor #2		$	$	$	$
Subcontractor #3		$	$	$	$
Survey Administration and Implementation					
Contractor		$	$	$	$
Subcontractor #1		$	$	$	$
Subcontractor #2		$	$	$	$
Subcontractor #3		$	$	$	$
Data Analysis and Reporting					
Contractor		$	$	$	$
Subcontractor #1		$	$	$	$
Subcontractor #2		$	$	$	$
Subcontractor #3		$	$	$	$
TOTAL Costs per above		$	$	$	$

Bidder Acknowledgment / Certification

The Bidder hereby certifies that the price(s)/rate(s) offered on this Bid Form are true and accurate to the best of the Bidder's knowledge.

The Bidder agrees that the price(s)/rate(s) offered herein shall remain in effect until CDPH awards the agreement and throughout the duration of the agreement. Any cost over runs or increases in services, if allowed, shall be billed at the price(s)/rate(s) stated for the appropriate budget period. Contract extensions, if any, shall be billed at the price(s)/rate(s) stated for the last budget period/year if more than one budget period/year is shown.

The Bidder further understands that the above quoted rate(s) must include all of the Bidders costs including operating expenses, labor, service call charges, diagnostic fees/estimates, transportation/travel costs, mileage or per diem expenses, equipment costs, supplies, annual inflation costs/rate adjustments, profit margin, etc. By submitting this Bid Form the Bidder hereby claims its willingness to certify to and comply with all requirements and terms and conditions cited in this Solicitation and any attachment thereto.

The Bidder understands that its bid response will become a public document and will be open to public inspection.

Bidder's Signature **Date signed**

Printed/typed name **Title**

ATTACHMENT 3 - BID CHECKLIST

Complete this checklist to confirm the items in your bid. Place a check mark or "X" next to each item that you are submitting to the State. For your bid to be responsive, all required attachments must be returned.

Qualification Requirements. I certify that I meet the following qualification requirements:	**Confirmed by CDPH**
My firm provides in detail the ability to conduct the services detailed in Section A.2 of the Solicitation entitled "Description of Services".	☐ Yes ☐ No
My firm possesses at least 3 years of experience of the types listed in Section A.2 of the Solicitation section entitled, "Bidder Minimum Qualifications". That experience occurred within the past five years.	☐ Yes ☐ No
My firm will supply before contract execution, resumes for each major professional staff person hired or assigned to services detailed in Section A.2 of the Solicitation entitled "Description of Services".	☐ Yes ☐ No
My firm has read and is willing to comply with the terms, conditions, and contract exhibits addressed in the Solicitation section entitled, "Contract Terms and Conditions".	☐ Yes ☐ No
(Corporations) My firm is in good standing and qualified to conduct business in California. **[Check "N/A" if not a Corporation.]**	☐ Yes ☐ No ☐ N/A
(Nonprofit Organizations) My firm is eligible to claim nonprofit status. **[Check "N/A" if not a nonprofit organization.]**	☐ Yes ☐ No ☐ N/A
My firm has a past record of sound business integrity and a history of being responsive to past contractual obligations. My firm authorizes the State to confirm this claim.	☐ Yes ☐ No
My firm will supply before contract execution, proof of self-insurance or copies of insurance certificates proving possession of appropriate liability insurance.	☐ Yes ☐ No
Bid Content. I have completed and returned the following Attachments included in the Bid Package:	**Confirmed by CDPH**
Attachment 1, Cost Proposal	☐ Yes ☐ No
Attachment 2, Additional Cost Proposal	☐ Yes ☐ No
Attachment 3, Required Attachment / Certification Checklist	☐ Yes ☐ No
Attachment 4, Business Information Sheet	☐ Yes ☐ No
Attachment 5, Bidder References	☐ Yes ☐ No
Attachment 6, Commercial Useful Function (CUF) Certification	☐ Yes ☐ No
Attachment 7, Bidder Declaration (GSPD-05-105) https://www.documents.dgs.ca.gov/pd/poliproc/MASTER-biddeclarverbal08-09.pdf	☐ Yes ☐ No
Attachment 8, Payee Data Record (STD 204) https://www.documents.dgs.ca.gov/dgs/fmc/pdf/std204.pdf	☐ Yes ☐ No
Attachment 9, Contractor Certification Clauses (CCC 04/2017) http://www.dgs.ca.gov/LinkClick.aspx?fileticket=5vWwqTeMoHk%3d&tabid=6133&portalid=32&mid=10104	☐ Yes ☐ No
Attachment 10, Target Area Contract Preference Act (TACPA) https://www.documents.dgs.ca.gov/dgs/fmc/pdf/std830.pdf	☐ Yes ☐ No
Attachment 11, California Civil Rights Laws Attachment https://www.documents.dgs.ca.gov/DGS/FMC/DGS/OLS004.pdf	☐ Yes ☐ No
Attachment 14, Certification of Non-Acceptance of Tobacco Funds TCFOR CTCP 18-10215 California Adult Tobacco Survey	☐ Yes ☐ No
(California Businesses) Copy of a current business license issued by the government jurisdiction in which the business is located, unless no license is required. Attach an explanation if a license copy cannot be supplied or there is reason to believe no license is required. **Check "N/A" if not a California business or no business license is required.**	☐ Yes ☐ No

Bid Content. I have completed and returned the following Attachments included in the Bid Package:	**Confirmed by CDPH**
(Corporations) Either a copy of the Certificate of Status issued by California's Office of the Secretary of State **or** a copy of the bidding firm's active on-line status information downloaded from the California Business Portal website. Attach an explanation if the required documentation cannot be supplied. **Check "N/A" if not a Corporation.**	☐ Yes ☐ No ☐ N/A
(Nonprofit Organizations) A copy of a current IRS determination letter indicating nonprofit or 501 (3) (c) tax exempt status. **Check "N/A" if not a nonprofit organization.**	☐ Yes ☐ No ☐ N/A
Signature **Date**	

ATTACHMENT 4
BUSINESS INFORMATION SHEET

This document provides the California Department of Public Health with basic information about the Bidder and its key subcontractors. Each Bidder must complete, sign and include this attachment in its proposal. A signature fixed hereon and dated certifies compliance with all offer requirements.

1. Bidder Information

Full Legal Name of Bidder			
Business Address (Street number and name)			
City	County	State	Zip Code
Contact Person		Title	
Telephone|	Fax	E-mail	

2. Type of Entity or Business Organization

Organization Tax ID Number:	How long under current ownership: (Years)
Nature of Business Activity:	
Number of employees:	Year established:

Legal form of organization (check one):

☐ Sole Proprietorship ☐ Corporation ☐ LLC ☐ General Partnership ☐ Sub-Chapter S Corporation
☐ Limited Partnership ☐ Other (describe) _____

3. Small Business Preference Claim

Is your organization certified as a small business by the State of California, or have you applied for certification?

☐ **No** ☐ **Yes** If yes, list your OSDS Number _____ ☐ Date certified _____
☐ Application submitted to Office of Small Business Certification and Resources on: _____ (date)

4. <u>Disabled Veteran Business Participation Acknowledgement</u>

I certify that I have read and understand the requirements of DVBE participation and understand my obligations in regard to DVBE. I also understand that failure to meet the requirements of the DVBE will cause my proposal to be rejected before evaluation.

☐ **YES** ☐ **NO** ☐ **N/A** DVBE Incentive Participation?? ☐ **YES** ☐ **NO**

Incentive Amount: _____**%**

5. Required Licenses and/or Certifications (if applicable) ☐ N/A

Required Licenses/Certifications	PUC License Number	Contractor's State Licensing Board No.

6. <u>Authorization and Certification</u>

I hereby authorize the California Department of Public Health to make any inquiries necessary to verify the information I have presented in my proposal. I hereby certify to the best of my knowledge and belief that I have read, understand, and do hereby accept the terms and conditions contained in this Solicitation package, including the provisions of the Contract Terms and Conditions and, further, I am willing to enter into an agreement with the CDPH to conduct the proposed project according to the terms and conditions offered.

I hereby certify to the best of my knowledge that the information contained in this proposal is correct and complete.

Signature of Authorized Representative	Date Signed
Printed/Typed Name	Title

The above information is required for statistical reporting purposes. Completion of this form is mandatory. This information will be made public upon award of the contract and will be supplied to department contract staff, Department of General Services and possibly other public agencies. To access contract related records, contact the Contract Management Unit, 1616 Capitol Avenue, Suite 74.262, MS 1802, PO Box 997377, Sacramento, CA 95899-7377, or call (916) 650-0100.

ATTACHMENT 5
BIDDER REFERENCES

Please provide documentation of at least three (3) years of experience performing services similar to the work in Section A.2. All experience must have occurred within the past five years.

REFERENCE 1

Name of Firm			
Street address	City	State	Zip Code
Contact Person	Telephone number ( )		
Dates of service	Value or cost of service		
Brief description of service provided			

REFERENCE 2

Name of Firm			
Street address	City	State	Zip Code
Contact Person	Telephone number ( )		
Dates of service	Value or cost of service		
Brief description of service provided			

REFERENCE 3

Name of Firm			
Street address	City	State	Zip Code
Contact Person	Telephone number ( )		
Dates of service	Value or cost of service		
Brief description of service provided			

If three references cannot be provided, explain why:

ATTACHMENT 6

COMMERCIALLY USEFUL FUNCTION (CUF) CERTIFICATION

CUF Certificationcdph9096a.pdf

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ATTACHMENT 7

BIDDER DECLARATION FORM (GSPD-05-105)

All bidders' must complete the Bidder Declaration Form (GSPD-05-105) and include it with the bid response.

The Bidder Declaration Form can be found at:
http://www.documents.dgs.ca.gov/pd/poliproc/MASTER-BidDeclar08-09.pdf

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ATTACHMENT 8

PAYEE DATA RECORD (STD 204)

All bidders' must complete the Payee Data Record (STD 204) and include it with the bid response.

The Payee Data Record (STD 204) is available at the following website:
http://www.documents.dgs.ca.gov/dgs/fmc/pdf/std204.pdf

If you do not have internet access please contact the CTCP Analyst listed on this solicitation.

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ATTACHMENT 9

CONTRACTOR CERTIFICATION CLAUSES (CCC 04/2017)

All bidders must complete the Contractor Certification Clauses form (CCC 04/2017) and include it with the bid response.

The Contractor Certification Clauses Form (CCC 04/2017) is available at the following website:
http://www.dgs.ca.gov/LinkClick.aspx?fileticket=5vWwqTeMoHk%3d&tabid=6133&portalid=32&mid=10104

If you do not have internet access please contact the CTCP Analyst listed on this solicitation.

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ATTACHMENT 10
(if applicable)

Target Area Contract Preference Act (TACPA)

Bidder's must submit with the bid response proof that they qualify under the Target Area Contract Preference Act (TACPA) to claim these incentives.

For more information: www.pd.dgs.ca.gov

If you do not have internet access please contact the CTCP Analyst listed on this solicitation.

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ATTACHMENT 11
(if applicable)

CALIFORNIA CIVIL RIGHTS LAWS ATTACHMENT

All bidders must complete the California Civil Rights Laws Attachment and include it with the bid response.

The California Civil Rights Laws Attachment is available at the following website:
https://www.documents.dgs.ca.gov/dgs/FMC/DGS/OLS004.pdf

If you do not have internet access please contact the CTCP Analyst listed on this solicitation.

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ATTACHMENT 12

Sample Pre-Screening Questions

All bidders must account for the pre-screening questions to be asked of respondents in the bid response.

The Sample Pre-Screening Questions Attachment can be found at: **TCFOR CTCP 18-10215 California Adult Tobacco Survey**.

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ATTACHMENT 13

Sample Survey Questionnaire

All bidders must account for a survey that is approximately 120 questions in length (median time of 20 minutes) to be asked of respondents in each wave in the bid response. A sample survey instrument from a previous iteration of the Online California Adult Tobacco Survey is provided.

The Sample Survey Questionnaire Attachment can be found at: **TCFOR CTCP 18-10215 California Adult Tobacco Survey**.

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ATTACHMENT 14

Certification of Non-Acceptance of Tobacco Funds

All bidders must complete the Certification of Non-Acceptance of Tobacco Funds and include it with the bid response.

The Certification of Non-Acceptance of Tobacco Funds Attachment is available at the following website:
TCFOR CTCP 18-10215 California Adult Tobacco Survey

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