PRE-BID WEBINAR

Solicitation CTCP 18-10215
CALIFORNIA ADULT TOBACCO SURVEY

CALIFORNIA DEPARTMENT OF PUBLIC HEALTH
CALIFORNIA TOBACCO CONTROL PROGRAM

November 2, 2018
10:00 AM

California Department of PublicHealth

California CTCP Tobacco Control Program

PRESENTERS

Tam Vuong
Research Scientist
Evaluation and Surveillance Section

Robert Bell
Procurement Manager
Federal Projects Unit

Scott Kelley
Digital Communications Supervisor
Knowledge Management Unit

HOUSEKEEPING

- ✓ This webinar is a **recording**. Slides from this pre-bid webinar will be made available on the *Tobacco Control Funding Opportunities & Resources (TCFOR)* website (https://tcfor.catcp.org/) approximately 24 hours after the conclusion of this webinar.
- ✓ All participants will be on mute during this webinar.
- ✓ Please submit all questions related to this solicitation in the chatbox during the webinar. Responses to all questions received during the webinar will be posted on the TCFOR website by **November 8, 2018**.

WEBINAR AGENDA

1. General Information
2. Service to be Provided
3. Eligibility Criteria and Minimum Qualifications
4. Instructions for Completing Application
5. Cost Proposal/Prop 56
6. Online Tobacco Information System (OTIS) Demonstration
7. Q&A Session

GENERAL INFORMATION

The solicitation instructions take precedence over anything said during this webinar. Interested applicants are to refer to the solicitation instructions for application criteria and requirements. It is strongly advised that interested agencies frequently check the TCFOR website for potential updates, corrections, or modifications to the solicitation.

TCFOR: https://tcfor.catcp.org/

GENERAL INFORMATION

The solicitation requires bidders to submit bids online via the Online Tobacco Information System (OTIS). Several online trainings are also available within OTIS. It is recommended that bidders begin their application early to allow adequate time to submit information into OTIS.

Pay attention to the key dates and deadlines listed on Page 5 to 6 of the solicitation document.

KEY DATES (PAGE 5 TO 6)

ACTIVITY	ACTION DATE
Solicitation Release Date	October 25, 2018
Pre-Bid Webinar	November 2, 2018
Question Deadline	November 6, 2018 by 5:00 PM PST
Responses to Questions Posted	November 8, 2018
Mandatory Letter of Intent Deadline	**November 13, 2018 by 5:00 PM PST**
Bid Deadline	**November 30, 2018 by 5:00 PM PST**
Notice of Intent to Award	December 5, 2018
Contract Start Date	January 1, 2019
Contract End Date	December 31, 2021

DATES ARE SUBJECT TO CHANGE

INITIAL CONTRACT TERM & FUNDING AMOUNT

The initial contract term is: **January 1, 2019 – December 31, 2021**

The maximum funding amount for the 36-month (3-year) funding period is anticipated to be:

$300,000 PER YEAR
$900,000 OVER THE THREE-YEAR PERIOD

FUNDS CANNOT CARRY OVER FROM FISCAL YEAR TO FISCAL YEAR WITHOUT PRIOR AUTHORIZATION FROM CTCP AND A CONTRACT AMENDMENT

SOLICITATION PURPOSE

To solicit 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.

SERVICES TO BE PROVIDED (PAGE 3 TO 4)

- ✓ Administer two (2) waves of the Online California Adult Tobacco Survey to a probability-based online panel annually.
- ✓ Each wave must meet the following sampling targets. The use of opt-in sample will be allowed to meet sampling targets.
  1. 3,000 completed surveys
  2. 300 non-Hispanic African American/Black respondents
  3. 300 low socioeconomic status respondents
  4. 500 current smokers respondents

SERVICES TO BE PROVIDED (PAGE 3 TO 4)

- ✓ Survey will be approximately 120 questions in length (median time of 20 minutes).

A previous iteration of the Online California Adult Tobacco Survey is provided in Attachment 13 with a median completion time of approximately 20 minutes. Required pre-screening questions can be found in Attachment 12. If these questions were not asked of the panel prior to the survey, bidders must incorporate these questions into the survey. A copy of these attachments can be found on TCFOR.

SERVICES TO BE PROVIDED (PAGE 3 TO 4)

- ✓ Three (3) hours of technical assistance on survey wording, layout, and English to Spanish translation is to be provided annually.
- ✓ Progress reports must be submitted to CDPH/CTCP.

ELIGIBILITY CRITERIA (PAGE 5)

- ✓ Certify no conflict of interest with tobacco, e-cigarette, or related industries exists. **This includes any independent subcontractor(s) and/or consultant(s).**
- ✓ Certify that the bidder is in good standing, fiscally stable, and qualified to conduct business with the State of California.
- ✓ Non-profit organizations must certify their eligibility to claim non-profit status.
- ✓ Bidders must acknowledge and agree that they will comply with all proposed terms and conditions in the solicitation including the terms appearing in the referenced contract exhibits.

MINIMUM QUALIFICATIONS (PAGE 5)

- ✓ Bidders, including independent consultant(s) and subcontractor(s), must have the ability to conduct the services detailed in Section A.2 of the Solicitation entitled "Description of Services".
- ✓ Bidder's personnel must have **three or more years** of the following experience below. Experience must have occurred within the past five years.
  1. Recruiting and/or maintaining a probability-based online panel
  2. Survey methodology, including sampling, weighting, and benchmarking
  3. Fielding survey instruments online

KEY DATES (PAGE 5 TO 6)

ACTIVITY	ACTION DATE
Solicitation Release Date	October 25, 2018
Pre-Bid Webinar	November 2, 2018
Question Deadline	November 6, 2018 by 5:00 PM PST
Responses to Questions Posted	November 8, 2018
Mandatory Letter of Intent Deadline	**November 13, 2018 by 5:00 PM PST**
Bid Deadline	**November 30, 2018 by 5:00 PM PST**
Notice of Intent to Award	December 5, 2018
Contract Start Date	January 1, 2019
Contract End Date	December 31, 2021

DATES ARE SUBJECT TO CHANGE

LETTER OF INTENT (PAGE 6)

A mandatory letter of intent must be uploaded to the TCFOR website by **5:00 PM on Tuesday, November 13, 2018**. The letter of intent is **mandatory**, but **non-binding**.

The letter of intent must:

- ✓ be on the applicant's letterhead;
- ✓ include the name and number of the solicitation under which the bid will be submitted (Solicitation #18-10215); and
- ✓ include the signature of the authorized bidder, signatory, or their official agent.

Access to OTIS will only be granted once an official letter of intent has been submitted. Bidders are recommended to submit a letter of intent early in order to gain access to OTIS.

BID REQUIREMENTS

- ✓ Includes all documentation identified in the Required Attachment Checklist Attachment 3
- ✓ Include documentation to assess minimum qualifications are met:
  1. Response establishing the bidder and any independent subcontractor(s) and/or consultant(s) have the ability to conduct the services detailed in Section A.2 of the Solicitation entitled "Description of Services"
  2. Three (3) reference from projects of similar size and scope
  3. Resumes for each major professional staff assigned or job qualifications for major staff to be hired to perform work under this agreement

ADDITIONAL DOCUMENTATION IN OTIS

Required Documents

- ✓ Cost Proposal
- ✓ Additional Cost Proposal
- ✓ Business Information Sheet
- ✓ Bidder Reference Sheet
- ✓ Bidders Declaration Form
- ✓ Certification of Non-Acceptance of Tobacco Funds
- ✓ Civil Rights Laws Certification
- ✓ Franchise Tax Board Entity letter (Corporations)

Documents that may apply

- ✓ Commercially Useful Function (CUF) Certification
- ✓ Target Area Contract Preference Act (TACPA)
- ✓ Proof of Non-Profit Status
- ✓ Additional Tobacco Control Funding

Post Award Documents

- ✓ Payee Data Record (STD204)
- ✓ Contractor Certification Clauses
- ✓ Copy of Liability Insurance

COST PROPOSAL (ATTACHMENT 1)

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		$ -	$ -	$ -	$ -

- ✓ Form is downloadable from OTIS in the additional documents section
- ✓ Actual expenditures may not exceed $300,000 in any fiscal year
- ✓ Show fully loaded costs for agency/contractor and all subcontractors

COST PROPOSAL (ATTACHMENT 2)

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	
Contractor		$	$	$	
Subcontractor #1		$	$	$	
Subcontractor #2		$	$	$	
Subcontractor #3		$	$	$	
Contractor		$	$	$	
Subcontractor #1		$	$	$	
Subcontractor #2		$	$	$	
Subcontractor #3		$	$	$	
Contractor		$	$	$	
Subcontractor #1		$	$	$	
Subcontractor #2		$	$	$	
Subcontractor #3		$	$	$	
TOTAL Costs per above		$	$	$	

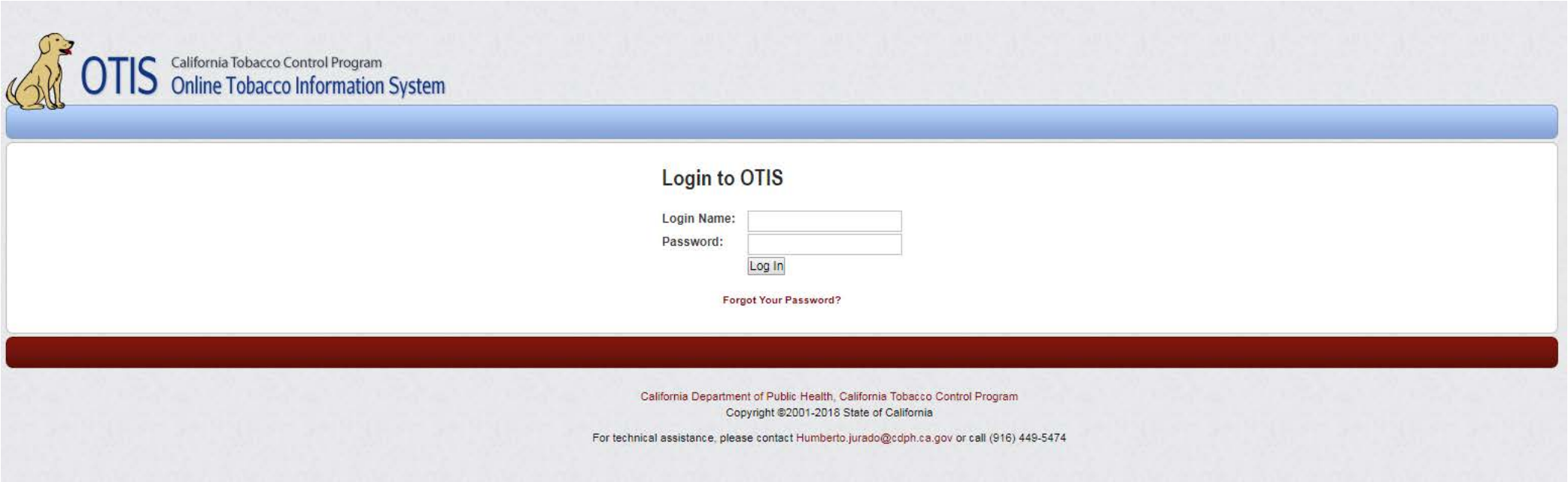
- ✓ At its sole discretion, CDPH/CTCP shall have the option to provide for an additional two-year term pending funding availability and satisfactory progress reports.
- ✓ The option will extend the contract term for an additional two years, ending December 31, 2023.

PROP 56 FIDUCIARY RESPONSIBILITY

- ✓Funds must be spent for the purposes identified in the California Adult Tobacco Survey Solicitation
- ✓Prop 56 funds may be audited every 2 years
- ✓Accounting records shall be kept and made available to CTCP for 3 years from the date of the final payment

TCFOR: HTTPS://TCFOR.CATCP.ORG/

ONLINE TOBACCO INFORMATION SYSTEM (OTIS)



HELP DESK SUPPORT

Help Desk Support

- ✓ POC 1: Humberto Jurado
  humberto.jurado@cdph.ca.gov
  (916) 449-5474

- ✓ POC 2: Scott Kelley
  scott.kelley@cdph.ca.gov
  (916) 449-5567

TIPS FOR A SUCCESSFUL PROPOSAL

- ✓Tip #1: Carefully read and review and follow all of the instructions in the Solicitation.
- ✓Tip #2: Always be clear and concise.
- ✓Tip #3: Proof read your documents and ensure that all documents uploaded to OTIS are clean and free of comments, ~~track changes~~, and typos.
- ✓Tip #4: Ensure all Additional Documents are:
  - ✓Signed by the appropriate agency representative
  - ✓Fully completed
  - ✓Correctly uploaded

TIPS FOR A SUCCESSFUL PROPOSAL

- ✓ Tip #5: **<u>Don't wait until the last minute!</u>**
  - ✓ Mandatory Letter of Intent Deadline: November 13, 2018, 5:00 PM, PT
  - ✓ Proposal Submission Deadline: November 30, 2018, 5:00 PM, PT

QUESTION & ANSWER TIME

We will now be taking any questions you may have about this Solicitation. Please type your question in the chat box and we will try and answer them.

- ✓ If you have a question and think about it after this webinar or you are listening to this recording after the meeting. After the meeting, you can submit your questions to the CTCP's inbox at CTCPInbox@cdph.ca.gov make sure to include in your Subject line "**Solicitation CTCP #18-10215**" by 5:00 PM on **November 6, 2018**. Responses to all questions, emailed or received during the webinar, will be posted on the TCFOR website by **November 8, 2018**.
- ✓ A recording of this webinar will be posted on the TCFOR website under the Meetings/Training section of the Solicitation.

Thank you for attending the Webinar!