# Statewide Policy and Community Organizing Training and Technical Assistance
# CTCP 09-11173

Informational
Teleconference/Webinar

Tuesday, January 13, 2009

Fax Questions to (916) 449-5505 or (916) 449-5517

# Welcome

## Informational Teleconference/Webinar

## Meeting Presenters:

John Francis
Policy Consultant
Local Programs and Priority Populations Unit

Robert Thurman
Procurement Manager
Administrative Support Unit

Humberto Jurado
Technology Projects Analyst
Library and Information Services Unit

Fax Questions to (916) 449-5505 or (916) 449-5517

# Agenda

Welcome & General Announcements

RFP Presentation

Break (15 minutes)

Q & A Session

OTIS Training

Information Meeting Ends (11:00)

# - REMINDERS -

- This is an Avaya Webinar.  For problems accessing the Avaya web conference, limited technical assistance will be available at (916) 449-5500.

# - REMINDERS -

- The RFP instructions take precedence over anything said during the meeting today.
- Interested proposers are to refer to the RFP instructions for clarification on the RFP criteria and requirements.
- The California Tobacco Control Program will post any updates, corrections, or modifications to the RFP on the Tobacco Control Funding Opportunities & Resources (TCFOR) website.
- Strongly encourage that interested agencies frequently access the TCFOR website for potential updates, corrections, or modifications to the RFP.
- TCFOR can be found at: http://tcfor.catcp.org.

Fax Questions to (916) 449-5505 or (916) 449-5517

# - REMINDERS -

- The RFP requires proposers to submit proposals online via the Online Tobacco Information System (OTIS). There is an OTIS training session included in this teleconference.

- Don't Wait until the last minute. It may take 20 to 40 hours to load your information onto OTIS. Agencies are strongly encouraged to begin writing proposals in a word file that can be cut and copied into the OTIS system, and to allow adequate time to load information into OTIS. Note: this does not include uploading your evaluator information and other forms required for the application.

- Presentation materials will be posted on the TCFOR website after the presentation is complete.

Fax Questions to (916) 449-5505 or (916) 449-5517

# Question and Answer Period

- This call will end when all questions are answered, which may be before the 11 a.m. scheduled end time.
- During the presentation, questions may be posted to the AVAYA Web board during the call.
- Also questions may be submitted by fax:
  - (916) 449-5505 or (916) 449-5517
- A brief break will follow the RFP presentation to allow CTCP to review the questions.
- Questions will be read and answered by CTCP staff at that time only.

Fax Questions to (916) 449-5505 or (916) 449-5517

# RFP Presentation

Fax Questions to (916) 449-5505 or (916) 449-5517

# Section I
# RFP Purpose

- Award a single contract to operate, maintain, and provide statewide technical assistance (TA) services for the development of tobacco control policy and community organizing.

- Recipients of the services provided will be CTCP-funded agencies who operate tobacco control-related projects throughout California.

- To learn more about CTCP:
  - **Section VI: CTCP Program Priorities Overview, and**
  - http://www.cdph.ca.gov/programs/Tobacco/

# Section I
# RFP Goals

**The overarching goals for this statewide training and technical assistance project are to:**

- **Increase the capacity and skills of CTCP-funded agencies**
- **Strategize and remove barriers to local tobacco control policy efforts.**
- **Promote the enactment and enforcement of local tobacco control policies.**
- **Increase capacity to effectively engage elected officials and key opinion leaders.**

# Contract Term

- July 1, 2009 – June 30, 2012 (36 months)
- Proposals must be submitted for full 36 month term.
- Contract not effective until signed by both parties.

# General Proposal Information

## Anticipated Funding

1. Up to $1,800,000 for 36-months.
2. Funding for the award and each Fiscal Year dependent upon revenues from the Cigarette & Tobacco Surtax Fund.

# Eligibility & Selection Criteria:

Carefully review the criteria for application. Note:

- Any public or private non-profit agency is eligible to apply.
- State of California agencies other than state universities, colleges, and community colleges are not eligible (LLAs).
- We will not fund an agency that has a relationship with a tobacco company.
  - Certification required
- Applications must meet the mandatory requirements to be reviewed and scored.
- Proposals will be scored on a scale of 0 to 100 points.

Fax Questions to (916) 449-5505 or (916) 449-5517

# Eligibility & Selection Criteria:

- Proposals receiving a final group consensus score of 75 points or more will be considered for funding.
- Receiving a final group consensus score totaling 75 points or more will not guarantee funding or funding at the level requested in the proposal.
- *Please Review TCFOR for a more detailed description of the Eligibility & Selection Criteria.*
- You will also need to review CTCP's Reservation of Rights

# Key Dates:

- **01/14/08 First Day to Request to Apply**
- 01/14/09 OTIS opened for proposal input
- **02/12/09 Last Day to Request to Apply**
- **02/13/09 Proposals due no later than 5 p.m. PST**
- 02/27/08 Notification of award decision
- 03/02/09 Contract negotiations begin
- 03/06/09 Appeals due by 5 p.m. PST
- 03/11/09 Appeal hearings
- 03/13/09 Appeal Decisions Announced
- 07/01/09 Contract term begins
- 06/30/12 Contract term ends

# Two Websites You *Will* Know

- Tobacco Control Funding Opportunities and Resources (TCFOR)
  - The place to find all your application information
  - http://tcfor.catcp.org/

And,

- OTIS
  - The place to submit your application
  - http://tcsotis.org/

# TCFOR

California Tobacco Control Program

Contact Us | FAQ

## Funding Opportunities and Resources

Navigation

The California Tobacco Control Program, California Department of Public Health provides information on available funding opportunities to conduct: local tobacco control projects by community-based organizations and local health departments, statewide training and technical assistance projects, statewide evaluation/surveillance projects, and statewide paid media and public relations projects. Resource documents, links to directories and websites, and information about trainings that help applicants with the preparation and submission of an application are also provided.

**Funding Opportunities**
Provides information about current funding opportunities, eligibility requirements, submission requirements, contract documents, and resources to help agencies prepare and submit an application to the California Tobacco Control Program.

**Project Directory**
Provides contact information and project descriptions for agencies currently funded by CTCP.

**Local Program Evaluator Directory**
Find contact information, qualifications and geographic availability of local program evaluators interested in working with local tobacco control projects in California.

**CTCP Featured Websites**
Find links to websites maintained by the CTCP, statewide CTCP-funded projects, and key national tobacco control organizations.

Fax Questions to (916) 449-5505 or (916) 449-5517

# TCFOR

**The following information is on TCFOR:**

- **Deadline (February 13, 2009)**
- **Purpose**
- **Application Information**
- **Contract Documents**
- **Meetings / Training**
- **How to Apply**
- **Eligibility & Selection Criteria**
- **Key Dates**
- **Total Award**
- **Contact**
- **Related Materials and additional resources**

Fax Questions to (916) 449-5505 or (916) 449-5517

# Application Information

Application Information is broken into 7 separate documents. Each document provides unique information important for completing your application

- Section I: Purpose and Goals
- Section II: Work Statement
- Section III: Application/Proposal Requirements and Instructions
- Section IV: General Application/Proposal Information
- Section V: Administrative and Program Requirements
- Section VI: CTCP Program Priorities Overview
- Section VII: Certification of Non-Acceptance of Tobacco Funding
- Appendix: 1-6

- SUGGESTION: Download/Save and carefully review *each* document.

Fax Questions to (916) 449-5505 or (916) 449-5517

# Section II
# Work Statement

- The Work Statement is an RFP-specific document that defines the core work components, proposal requirements, instructions, and scoring criteria.
- Defines content requirements and provides the criteria on how the application will be scored.

- The following three sections will be scored:
  - Applicant Capability (40 points)
  - Scope of Work (35 points)
  - Budget Justification (25 points)

# RFP Core Work Components

Work Components (minimum work required) reflects the RFP goals, seeking the following Services:

1. Provide policy and community organizing training and technical assistance

2. Develop tobacco policy-related materials and resources that facilitate tobacco control efforts or support advocacy campaigns.

3. Coordinate information and education visits with state elected officials.

# Applicant Capability

This section of your application will describe the qualifications of your agency.

Components include:

- Program Experience
  - Do not upload resume's.
- Organizational Start Up
- Administrative/Fiscal Experience
- Equipment
- Letters of Reference

# Applicant Capability

**Scenarios:** A component of Applicant Capability includes responding to two scenario questions. The questions will evaluate:

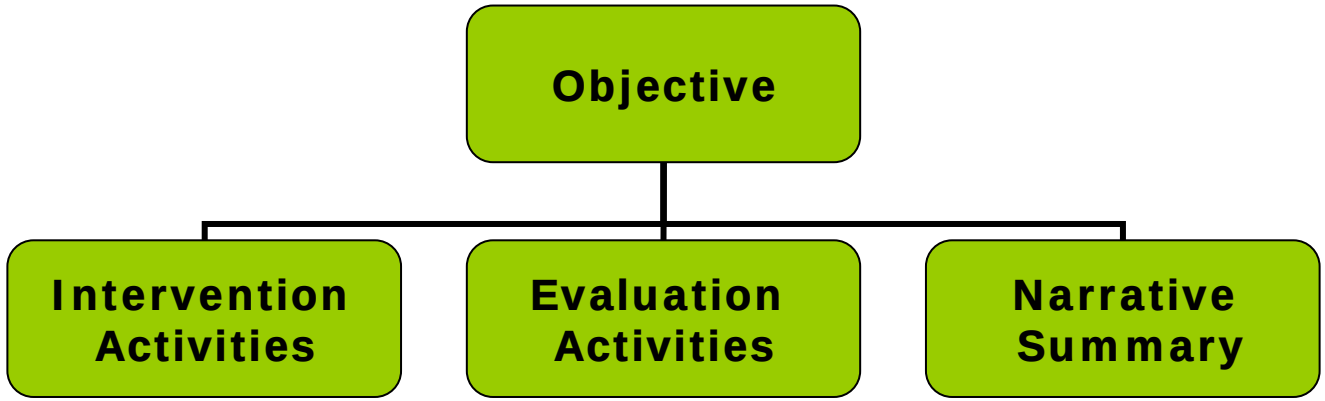
- Knowledge of the previously proposed FDA legislation to regulate tobacco products and your ability to provide a strategic plan in response.

And,

- Capacity to make budgetary and programmatic changes in order to meet RFP goals and requirements given an unforeseen funding reduction.
  - We do not anticipate a funding reduction.

# Scope of Work

- The SOW describes all program activities to be performed that will lead to the accomplishment of measurable objectives, and evaluation activities that assess the extent to which each objective was achieved. Objectives include:



# Objectives: Intervention & Evaluation

Each Objective in OTIS will require the following information:

- Objective Overview
- Intervention topics, activities, and materials development forms
- Evaluation design, activity plan, and reporting.

# Narrative Summary

Each Objective in OTIS will require the a Narrative Summary. The summary includes:

- Community Assessment Analysis
  - You don't have to conduct a formative assessment
- Major Intervention Activities
  - *How detailed does this need to be?*
- Theory of Change
  - Answers "why?"
- Evaluation Summary

Suggestion: For completing Objectives, Interventions, and Evaluations, refer to *Communities of Excellence in Tobacco Control*, *Modules 2 & 4*

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# Assets

- The following Communities of Excellence (CX) assets may be addressed in this RFP:
  - 2.1, 2.2, 2.3, 2.5, 3.4, and 3.7
- Can one objective have multiple assets?
  - Yes
- Can multiple objectives use the same asset(s)?
  - Yes
- Where can you find more information on CX Indicators and Assets?
  - *Communities of Excellence, Module 2.*

# Additional RFP Sections

# Section III: Application/Proposal Requirements and Instructions

- Document clearly defines the general components and requirements for all applicants.
- Use this document with Section II: Work Statement
- **Note:** Section III provides links to Supplementary Documents (*OTIS User & Evaluation Guides, CTCP Policy Manual, Tell Your Story, and CX Module 4*)

# Section IV: General Application/Proposal Information

- This Section provides:
  - Submission requirements,
  - Instructions for accessing the online application (e.g., how to apply),
  - Appeals process,
  - CTCP's reservation of rights, and
  - Contract terms and conditions.

- **Request to Apply:** Instructions for Accessing Online Submission (http://tcfor.catcp.org/)

# Section IV: General Application/Proposal Information

TCFOR Website Instructions

- For more guidance please refer to the **"Request to Apply Instructions"** document on TCFOR.

Link:

- http://tcfor.catcp.org//opportunities/TCFOR_User_Inst.pdf

# Section V: Administrative and Program Requirements

- Document provides contracting procedures, requirements, and expectations.
- Describes the capacities required to successfully complete all deliverables identified in the Scope of Work (SOW).
- Review these 16 requirements to determine the capacities necessary to enter into a fully executed contract with CTCP.

# Section VI: CTCP Program Priorities Overview

- This document outlines the mission, goals, infrastructure, history, and the social norm model utilized by CTCP.

# Section VII: Certification of Non-Acceptance of Tobacco Funding

- Applicants will need to complete this certification in their application.
- Please refer to Section III: Application/ Proposal Requirements and Instructions (p33) for information and instructions.

# Appendices

- 1. Appendix: Comparable State Civil Service Classifications
- 2. Appendix: Computer Hardware/Software Minimum Specifications
- 3. Appendix: Evaluation Design: Determining the Plan Type for Each Objective
- 4. Appendix: Moratorium Related to Promotional Items Distributed by the CA Dept. of Public Health: Updated Interim Guideline on Use of Promotional Items
- 5. Appendix: Sample Internal Revenue Service Letter
- 6. Appendix: Sample Secretary of State, Statement of Information

# Contract Documents

TCFOR also provides the following Contract Documents:

- Grant Agreement Form (CDPH 1229) (Draft)
- Exhibit A: Scope of Work (Provided to awardee at negotiation)
- Exhibit B: Budget Detail and Payment Provisions (Provided to awardee at negotiation)
- Exhibit C: General Terms and Conditions (GTC307 and CCC307 Certification)
- Exhibit D(S): Special Terms and Conditions (Draft)
- Exhibit E: Additional Provisions (Provided to awardee at negotiation)
- Exhibit F: Contractor's Release Form (Draft)
- Exhibit G: Travel Reimbursement Information (Draft)

# Related Materials:

- Funding Opportunities Website Instructions
- Other Materials:
  - CTCP Administrative and Policy Manual
  - OTIS Evaluation Guide
  - Tell Your Story: Guidelines for Preparing a Complete High Quality Evaluation Report
  - Communities of Excellence in Tobacco Control, Module 4
  - OTIS User Guide - (Available within the OTIS system - UN/PW required)

# Section 2 & 3
# Work Statement & Application/Proposal Requirements and Instructions

Requirements and

Scoring Criteria

25 Points

Fax Questions to (916) 449-5505 or (916) 449-5517

# Section 3
# Application/Proposal Requirements and Instructions

- The Budget Justification must:
  - Provide a complete budget plan for the entire contract term
  - Budget in the State Fiscal Year cycle (July through June)
  - Accurately detail the expenses connected to the SOW activities
  - Consider any increased/decreased project activities

# Section 2: Work Statement

## Minimum requirements and scoring criteria for the budget justification

- Budget Justification Cost Categories
  - For the thirty-six (36) month period, proposals are required to budget for these eight (8) contract line item categories:

1. Personnel Costs
2. Fringe Benefits
3. Operating Expenses
4. Equipment
5. Travel/Per Diem and Training
6. Subcontracts and Consultants
7. Other Costs
8. Indirect Costs

# Minimum requirements and scoring criteria for the budget justification

## 1. PERSONNEL COSTS

- Designate a lead staff responsible for not less than 5% (five percent) full time equivalent (FTE) oversight and coordination of project evaluation activities. 5% is approximately 2 (two) hours weekly for 100% FTE.
- Provide narrative descriptions for each position classification that clearly describes the support to the intervention and evaluation activities identified in the SOW and Work Statement.
- Personnel Salaries, subcontract, and consultant costs are budgeted at comparable State Civil Service classifications levels; and, any salaries that are higher are fully justified to merit the higher salary cost.

# Section 2: Work Statement

## Minimum requirements and scoring criteria for the budget justification

2. Fringe Benefits
   - List and describe fringe benefits for eligible project staff. The fringe benefits should be consistent with State policies. Provide a cost for each fringe benefit.
3. Operating Expenses
   - 2 Required line items
     - CTCP Communications Network
       1. OTIS
       2. Partners
     - Space Rent/Lease
   - Other agency Operating Expenses as necessary

4. Equipment
   - Equipment purchases are only allowed to bring one Primary Agency's computer system up to the CTCP minimum software/hardware specifications as outlined in the Appendix: Computer Hardware/Software Minimum Specifications.
   - No other equipment purchases will be allowed.

# Section 2: Work Statement

## Minimum requirements and scoring criteria for the budget justification

5. Travel/Per Diem & Training
   - Under the required CTCP travel and training line item; the Project Directors meetings are currently scheduled for August 2010 (FY 2010-11); and, February 2012 (FY 2011-12). Budget for at least one staff member to attend this meeting in each of these FY's.
   - Other travel/per diem to complete the SOW

6. Subcontracts & Consultants
   - CTCP must review and approve cost over $50,000
7. Other Costs
   - Sponsorships are not applicable to this RFP. Therefore, it is not necessary to add or change any information in the budget justification.
8. Indirect Expenses
   - Indirect expenses are calculated at a maximum of 25% (twenty-five percent) of the total personnel expenses (salary expenses plus fringe benefits). List and describe all indirect costs.

# Section 3
# Application/Proposal Requirements and Instructions

- Instruction Samples/Examples
- California Tobacco Control Program Request for Application
  - CTCP 09-11173

- The following samples are examples for informational purposes only. They are used for RFP instruction and interpretation.

# Personnel Cost Example

- **Title:**
  Project Director (Who's Responsible in the SOW)

  **Salary Calculation (i.e., Formula):**
  ($2,875-$3,082 semi-monthly) x (100%) x 24 pay period per year

  **Duties Description:**
  Responsible for the overall planning, development and completion of project goals, objectives and SOW deliverables. Supervise agency staff, project consultants and subcontractors. Responsible for the fiscal accountability of project budget. Responsible for the general coordination of the day-to-day operations and reporting progress at scheduled intervals to CDPH/CTCP. Maintains liaison with CDPH/CTCP Program Consultant and Contract Manager. Responsible for the budget, budget revisions, invoices, staff changes, consultant contracts, and ensures timely progress on contract obligations, and other duties as required. Designated lead and devotes 5% FTE of effort to oversee the implementation of project evaluation and supervision of the evaluation consultant.

# Personnel Cost Example

- **Title:**
  Project Associate

  **Salary Calculation:**
  ($1,700-$1,800 semi-monthly) x (100%) x 24 pay periods per year

  **Duties Description:**
  Responsible for the logistical coordination of information and education visits at the Capitol and in the districts; manages the Center website and offline resources; maintains databases, word processing, and working with web-based Internet functions; provides administrative support for the policy and organizing activities of the Center; provides technical assistance resources to CDPH/CTCP-funded projects, tobacco control advocates, voluntary health organizations; and other duties as assigned by the Project Director. Works closely with Project Director to manage the Center office to ensure an effective and efficient operation. This position is supervised by the Project Director.

# Fringe Benefit Example

- **At approximately** 20% - 40% **of Total Personnel Costs, Fringe Benefits includes the following:**

  Fringe Benefits are paid eligible employees according to state and agency policies. They include FICA, FUTA, State unemployment insurance, long term Disability Insurance, Worker's Compensation insurance, Health, Dental, Vision, Life (approximately 25%) and Pension (approximately 10%). Vacation and other leave are not expensed in fringe benefits.

# Section 3
# Application/Proposal Requirements and Instructions

- Reminder:

- Additional Fringe Benefit Information

  - TCFOR Website
    - Contract Documents, Exhibit D(S), Provision 20
    - Section IV, Pages 19 & 20

# Operating Expenses Example

- **Title:**
  Space Rent/Lease

  **Description (Formula):**
  FY 2007/08: July 2007-June 2008: 4 FTE x ~160 square feet (150 sq. ft. + 10 sq. ft.) x $1.95 per sq. ft. x 12 months = ~$14,976.00

# Travel Example

- **Title:**
  Project Travel/Training

  **Description:**
  Includes travel to local and regional coalition meetings, community organizing and campaign trainings and on-site technical assistance; participation in CDPH/CTCP statewide workgroup meetings and sponsored trainings; and, other local, regional or statewide stakeholder meetings. All in-state travel is approved by the Project Director. Travel is reimbursed according to state policies; which includes airfare, meals, lodging, incidental expenses and mileage.
- At approx. $1,200/month x 12 months = $14,400

# Section 3
# Application/Proposal Requirements and Instructions

- Subcontracting and Consulting

## Reminders

# Section 3
# Application/Proposal Requirements and Instructions

- Subcontractors and Consultants
  - Subcontractors
    - Usually for projects needing salaried positions, operating expenses, indirect costs etc.
    - Provides specialized tasks directly related to project's activities.
    - Personnel salaries are not to exceed those paid to similar State classifications.
    - CTCP must review & approve Subcontractors with costs exceeding $50,000.
    - Indirect Costs cannot exceed 25% of their Personnel Salaries & Fringe Benefits.

# Section 3
# Application/Proposal Requirements and Instructions

- Subcontractors and Consultants
  - Subcontractors – Continued
    - List each subcontractor identified in the SOW.
    - Provide the name of the agency, a description of activities to be performed, the period of time, and the total cost for services. Be as specific as possible.
    - If subcontractor is not yet identified, indicate To Be Determined and provide a narrative that describes the work to be performed and a budget formula that indicates the estimates for time, and amount needed for each FY.

# Section 3
# Application/Proposal Requirements and Instructions

- Subcontractors and Consultants
  - Consultants
    - Individuals who has area of expertise beyond that of agency's project staff.
    - Activities should support and supplement skills of staff and not duplicate agency skills or effort.
    - Typical services are technical advise or effort on programmatic activities/issues.
    - Rate paid to consultants should be commensurate with the consultant's education & experience.
    - Agencies expected to negotiate the lowest rate possible.
    - Must be identified in the SOW.

# Section 3
# Application/Proposal Requirements and Instructions

- Subcontractors and Consultants
  - Consultants – continued
    - List the consultants identified in the SOW.
    - Provide the consultant name, description of activities to be performed, period of time, hourly rate, number of hours to be worked, and total costs for services for each FY. Be as specific as possible.
    - If a consultant is not yet identified, indicate "To Be Determined" and provide a narrative that describes the work to be performed and a budget formula that indicates the estimates for time, pay rate and amount needed for each FY.

# Reminder

- There are two ‘Additional Documents” that are required as part of the actual application process.  You will have the capability to “Upload” these documents as part of the application process.

# Reminder

- Additional Documents
  - Proof of Non-Profit Status
    - As part of the application, scan and upload a copy of the document which certifies your agency's non-profit status.
  - Certification of Non-Acceptance of Tobacco Funds
    - **Must be signed by individual authorized to legally bind your agency to the certification.**
      - **Allow sufficient time to obtain the required signature.**

# Reminder

- Additional Documents – Continued
  - Certification of Non-Acceptance of Tobacco Funds – Continued
    - This document can be printed from Section VII on the TCFOR Web page for this RFP. This document will also be available in the application as a “Download” that can be printed.
    - Scan and upload the completed and signed certification as part of the application.

# What Happens After You Apply?

Fax Questions to (916) 449-5505 or (916) 449-5517

# Proposal Review

- Proposals will be reviewed & scored by a review panel.
  - Applications are scored on a scale of 0–100.
- Proposals with final consensus score of 75 points or more will be considered for funding.
- Scores of 75 points or more **are not** guaranteed for funding.
- The funding amount requested is not guaranteed.

# Award and Negotiations

## Notification of Award

- All agencies submitting a proposal will be notified of the award decision in writing.

## Contract Negotiation

- CTCP will schedule and conduct a negotiation with the potential contractor.
- Potential contractor will be required to revise SOW & Budget to comply with CTCP & CDPH requirements.
- Work shall commence only upon receipt of the fully executed contract.

# Appeals

## Appeal Process

- No appeals for proposals that are submitted late, are non-compliant, or incomplete.
- Appeals shall be limited to the grounds that CTCP failed to correctly apply the standards for reviewing the proposal in accordance with the RFP.
- Appeals due 3/09/2009, no later than 5 p.m. PST.
- Decision of appeal officer is final.

# If I Were An Applicant…

Fax Questions to (916) 449-5505 or (916) 449-5517

# Tip #1

- Carefully read and review all instructions in the RFP and pay particular attention to the **Scoring Criteria** found in the Work Statement Document.

- **Example: Applicant Capability**
  - Agency Mission: In OTIS, you will be asked to briefly describe how your Agency's general mission is consistent with the goals identified in this RFP.
  - Scoring Criteria: The applicants response will be scored on whether or not the Primary Agency has demonstrated if their agency's mission is consistent with the goals identified in this RFP.

# Tip #2

- Always be clear and concise.
- You should also assume the reviewers will have no knowledge of your agency's history or previous tobacco control programs administered by your agency.

# Tip #3

- Refer to the OTIS User Guide for instructions on completing the scope of work, which can be found at the “Help” section of the OTIS Web site at
  - http://www.tcsotis.org
- Refer to CX in Tobacco Control, Module 2 at
  - http://www.cdph.ca.gov/programs/Tobacco/Documents/CTCPCX2006-module2.pdf
- Refer to CX in Tobacco Control, Module 4 at
  - http://www.cdph.ca.gov/programs/Tobacco/Documents/CTCPCX2006-module4.pdf.

# Tip #4

- Develop your application, SOW, and Budget responses in Word and/or Excel first.
- For each objective activity, you will be required to complete the following information:

| Activity ## - ## - ## | |
|---|---|
| Activity: | |
| Intervention Category: | |
| Copyright: | |
| Program Deliverable Percentage: | |
| Start Date Period: | |
| Completion Date Period: | |
| Tracking Measures: | Measure Submit |
| Responsible Parties: | Responsible Party Budget Type |

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# Tip #5

Deliverable Percentages:

- Must be in 0.5 percent increments
- Need to be tied to tangible products or services to be produced or conducted.
- Coordination/Collaboration Activities typically ***<u>do not</u>*** receive a percent deliverable (i.e., 0.0%)

# Tip #6

- Before submitting, print and review your application, and get feedback from a colleague.
- In OTIS: select “Reports”, then “View Reports”

# Tip #6 Cont.

- Select and save/print “Web (Black & White)”.
- Suggestions include:

| TITLE | VIEW TYPE | | |
|---|---|---|---|
| Agency Certification | Web | Web (Black & White) | Word 2000 |
| Agency & Contract Information | Web | Web (Black & White) | Word 2000 |
| Contact Information | Web | Web (Black & White) | Word 2000 |
| Applicant Capability | Web | Web (Black & White) | Word 2000 |
| Local Program Evaluator | Web | Web (Black & White) | Word 2000 |
| Scope of Work: Overview & Intervention Activities | Web | Web (Black & White) | Word 2000 |
| Scope of Work: Overview & Evaluation Activities | Web | Web (Black & White) | Word 2000 |
| Scope of Work: Narrative Summaries | Web | Web (Black & White) | Word 2000 |
| Scope of Work: Materials | Web | Web (Black & White) | Word 2000 |
| Scope of Work: Deliverable Percentages | Web | Web (Black & White) | Word 2000 |
| Combined Scope of Work | Web | Web (Black & White) | Word 2000 |
| CMU -- Scope of Work, Exhibit A | Web | Web (Black & White) | Word 2000 |
| Budget Summary | Web | Web (Black & White) | Word 2000 |
| Budget Justification | Web | Web (Black & White) | Word 2000 |
| CMU -- Individual Budget Year 1 | Web | Web (Black & White) | Word 2000 |
| CMU -- Individual Budget Year 2 | Web | Web (Black & White) | Word 2000 |
| CMU -- Individual Budget Year 3 | Web | Web (Black & White) | Word 2000 |
| Project Abstract | Web | Web (Black & White) | Word 2000 |

# Tip #7

- When your application is finished, download and save/print the completed application for your files (preferably in landscape orientation)

- Suggested reports to save include: Agency Contact Information, Agency Capability, SOW, Narrative and Budget Justification.

# Tip #8

- Q: When should you include the Materials Development Form?
  - A: For any activity where your agency will be developing a **new** and **original** material that is described in the Intervention Activity Plan.
  - **Hint:** documents should be significant. *"Updating"* should be a clue that you **<u>do not</u>** have to complete a form.

# Tip #9

- Refer to the OTIS Evaluation Guide at http://www.cdph.ca.gov/programs/Tobacco/Documents/CTCPOtisEvalGuide-7.pdf for guidance on completing the Evaluation Design, Evaluation Activity Plan and Evaluation Reporting.

- Tracking Measure for Evaluation Reporting:
  - If Primary Objective: “Final Evaluation Report”
  - If Non-primary objective: “Brief Evaluation Report”

# Tip #10

There is no need to worry about total budget calculations. OTIS will automatically calculate the total budget for each fiscal year and the total amount requested for the contract term by using the amount you enter for each line item.

# Tip #11

Allow sufficient time for **everything**:

- Signatures are required to certify Non-Acceptance of Tobacco Funds.
- Evaluator and evaluator profile
- Subcontractors
- Entering data into OTIS.

# Tip #12

Need Help on OTIS?

- Call or Email Beto Jurado
  - Humberto.Jurado@cdph.ca.gov
  - (916) 449-5474

- Please remember: There are three RFP's with the exact same timeline.

# A Reminder of Key Dates:

- **01/14/08 First Day to Request to Apply**
- 01/14/09 OTIS opened for proposal input
- **02/12/09 Last Day to Request to Apply**
- **02/13/09 Proposals due no later than 5 p.m. PST**
- 02/27/08 Notification of award decision
- 03/02/09 Contract negotiations begin
- 03/06/09 Appeals due by 5 p.m. PST
- 03/11/09 Appeal hearings
- 03/13/09 Appeal Decisions Announced
- 07/01/09 Contract term begins
- 06/30/12 Contract term ends

# QUESTIONS & ANSWERS

We will take a 15 minute break.

Please submit your questions in writing via Avaya or Fax

Fax Questions to (916) 449-5505 or (916) 449-5517

# OTIS Training

# Work Statement

## Minimum requirements and scoring criteria for the budget and budget justification

Also refer to:

- Supplementary Documents
  - CTCP Competitive Grantee Administrative & Policy Manual
  - OTIS User Guide
  - Application/Proposal Requirements and Instructions document for this RFP