STATEWIDE YOUTH RECRUITMENT FOR TOBACCO CONTROL LAW ENFORCEMENT ACTIVITIES CTCP 09-11180

Informational Teleconference/Webinar

Tuesday, January 13, 2009

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

WELCOME

Informational Teleconference/Webinar

Meeting Presenters:

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Procurement Management Unit

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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 (2:00pm)

- 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.
- It is Strongly encouraged 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.

- 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 additional forms required for the application.

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

QUESTION AND ANSWER PERIOD

- This call will end when all questions are answered, which may be before the 2 p.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 recruit youth statewide for participation in tobacco sales to minors compliance checks conducted for enforcement and scientific survey purposes over a three-year period.

- Recipients of the services provided will be 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/

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SECTION I
RFP GOALS

The overarching goals for this statewide youth recruitment project are to:

- Recruit youth decoys for annual Youth Tobacco Purchase Survey (YTPS).
- Recruit youth decoys between the ages of 14 and 16 to support the CDPH, FDB in their enforcement investigations.
- Collaborate with tobacco control community with youth decoy operations and recruitment strategies.

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 $1,200,000 for 36-months.
2. Funding for the award and each Fiscal Year dependent upon revenues and appropriation by the Legislature and the Governor.

ELIGIBILITY :

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.

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:

- **01/14/09 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**
- 02/27/09 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.

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TCFOR

The following information can be found at TCFOR
http://tcfor.catcp.org/

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

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

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

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SECTION III
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 COMPONENT

CTCP is Seeking the following Service:
(e.g., Minimum Work Required)

Recruit, Train and Maintain youth decoys ages 14-16 from diverse backgrounds to perform undercover surveillance and compliance check tobacco-purchasing operations.

Coordinate and collaborate with FDB and an external data collector to develop, implement and evaluate recruitment.

APPLICANT CAPABILITY—40 POINTS

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

Components include:

- Program Experience
- Do not upload resumes.
- 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:

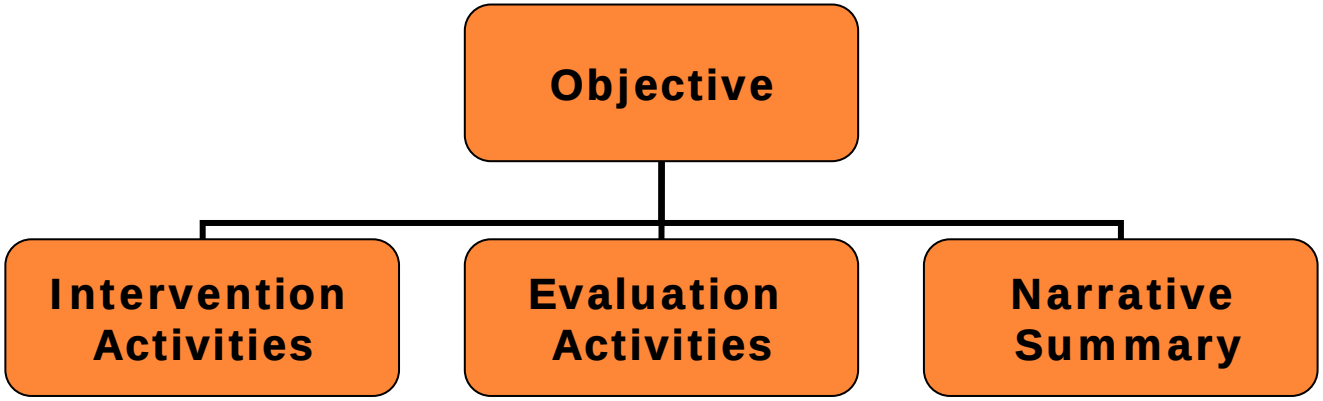
- Knowledge and experience with youth recruitment challenges and the agency's ability to take appropriate action.

And

- Capacity to make budgetary and programmatic changes in order to meet RFP goals and requirements given an unforeseen funding reduction.

SCOPE OF WORK—35 POINTS

- The SOW describes all program activities to be performed that will lead to the accomplishment of the measurable objective and evaluation activities that assess the extent to which the objective was achieved. The Objective includes:



OBJECTIVE, INTERVENTION & EVALUATION ACTIVITIES

- Required Objective: "By June 30, 2012, develop and maintain an ongoing youth decoy outreach program and recruit a minimum of 332 youth between the ages of 14-16 years to participate in tobacco sales surveys and enforcement activities statewide."

- Intervention Activity Plan
  - Intervention Category
  - Activity Description
  - Copyright
  - Percent Deliverable
  - Start/End Date
  - Responsible Parties
  - Tracking Measures
  - Materials Development Forms

- Evaluation Design & Activity Plan
- Evaluation Reporting

NARRATIVE SUMMARY

The Objective in OTIS will require 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, Module 4*

ADDITIONAL RFP SECTIONS

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

SECTION IV: APPLICATION/PROPOSAL REQUIREMENTS AND INSTRUCTIONS

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

SECTION V: GENERAL APPLICATION/PROPOSAL INFORMATION

- This Section provides the submission requirements, instructions accessing the online application (e.g., how to apply), appeals process, CTCP's reservation of rights, and the contract terms and conditions.

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

SECTION V: GENERAL APPLICATION/PROPOSAL INFORMATION

TCFOR Website Instructions

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

Link:

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

SECTION VI: 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 VII: CTCP PROGRAM PRIORITIES OVERVIEW

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

SECTION VIII: CERTIFICATION OF NON-ACCEPTANCE OF TOBACCO FUNDING

- Applicants will need to complete this certification in their application.

- Please refer to Section IV: 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
- Additional Background 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
- Exhibit E: Additional Provisions (Provided to awardee at negotiation)
- Exhibit F: Contractor's Release Form
- Exhibit G: Travel Reimbursement Information
- Exhibit H: Information Confidentiality and Security Requirements
- Exhibit I: Information Systems Security Requirements for Projects

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 - Username/Password required)

KEY DATES:

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06/30/12	Contract term ends

Budget Justification

Requirements and Scoring Criteria – 25 Points

BUDGET JUSTIFICATION INSTRUCTIONS

- **<u>The Budget Justification must:</u>**
- **Demonstrate the capability to develop a budget justification that reflects the RFP instructions and work statement.**
  - **Provide a complete budget plan for the entire contract term**
  - **Accurately detail the expenses connected to the SOW activities**
  - **Consider fluctuations of project activities in the budget from fiscal year to fiscal year.**
  - **Budget in the State Fiscal Year cycle (July – June)**
  - **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.**

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 periods 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.

- **BUDGET CATEGORY LINE ITEMS**

  For the thirty-six (36) month period, proposers are required to budget for these eight (8) budget categorical line items:

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**

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. This equals 2 hours per week for a FTE.**

- **List position title with narrative descriptions for each position.**

- **Include salary range, percent of time base, pay period frequency.**

Fringe Benefits

- **Fringe benefits are paid to eligible employees according to state and agency policies.**
- **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.**
- **TCFOR Website**
  - **Contract Documents, Exhibit D(S), Provision 20**
  - **Section IV, Pages 19 & 20**

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.

Operating Expenses

- **Two required line items**
  - **CTCP Communications Network, OTIS, & Partners**
  - **Space Rent/Lease**

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

- **EXCEPTION #1**
- Operating Expenses – **CTCP Communications Network,** OTIS and PARTNERS: **All STAKE Primary Agencies are required to obtain and maintain an active Internet account to also support and access the STAKE Act Web site.** ***There is no additional charge to maintain this account.***

- ***Operating Expenses*** – **Continued**
  - **Other agency defined Operating Expenses**
    - **Office Supplies**
    - **Postage**
    - **Duplicating**
    - **Communications**
    - **Printing**
    - **Equipment Lease/Rental**
    - **Audit Expenses**

Equipment

- **Equipment purchases are only allowed to bring one Primary Agency's computer system up to the CTCP minimum software/hardware specifications.**
  - **No other equipment purchases will be allowed.**

For additional information on equipment

- **Refer to TCFOR webpage,**
- **Section VIII,**
- **Appendix: Computer Hardware/Software Minimum Specifications.**

Travel/Per Diem & Training

TRAVEL EXAMPLE

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

- ***Travel/Per Diem & Training***

EXCEPTION #2

- Travel/Per Diem and Training - **CTCP Travel/Training: What is stated in the general provisions for CTCP Travel/Training for statewide contractors does not apply to activities to be conducted under this RFP. Therefore, you are not required to budget for conducting statewide trainings for CTCP-funded agencies.**

Travel/Per Diem & Training

Under the required CTCP travel and training line item; the Project Directors meetings are currently scheduled for <u>August 2010 (FY 2010-11)</u>; and, February 2012 (FY 2011-12).

- **Budget for at least one staff member to attend this meeting in each of these FY's.**

For additional info. refer to:

- **TCFOR webpage**
- **Section III**

Subcontractors and Consultants

Subcontractors

- **Usually for projects needing salaried positions, operating expenses, indirect costs etc.**
- **Subcontractor should provide a specialized task that is directly related to the project's activities.**

Consultants

- Individuals who have area of expertise beyond that of agency's project staff.
- Typical services are technical advice or effort on programmatic activities/issues.
- Rate paid to consultants should be commensurate with their education and experience and negotiated at the lowest possible rate.

- ***Other Costs***
  - **Educational Materials**
  - **Advocacy Campaign Materials**
  - **Behavior Modification Materials**
  - **Media**

    Note: If there are no expenses related to any line item, leave at $0.
  - **Sponsorships are not applicable to this RFP.** Therefore, it is not necessary to add or change any information in the budget justification.

- ***Other Costs*** – **Continued**

  Other Agency defined Subcategories

  - **Applicants may add other agency defined line items not already included in either Operating Expenses or Other Costs.**

  - **Examples of these types of line items:**
    - **Facility fees for renting a meeting room to conduct a training.**

    - **Renting a booth at a health care event.**

EXCEPTION #3

- Other Costs: **Behavior Modification Materials/Recognition Awards Information: A maximum of $50 worth/value per person per year does not apply to stipends paid to youth volunteers participating in FDB investigations who receive the $5.00/store or $30.00/day minimum compensation. Therefore, do not budget for stipends in this line item.**

EXCEPTION #4

- Other Costs: Behavior Modification Materials/**Food/Refreshments Information**:

A maximum of $50 worth/value of food refreshments per person per year does not apply for youth volunteers participating in FDB investigations who receive $5.00-$15.00 per day in food coupons for performing STAKE Act fieldwork. Therefore, do not budget for food coupons in this line item.

EXCEPTION #5

- Other Costs – Other Agency-Defined Subcategories, **Stipends**: **This RFP requires stipend distribution to youth participating in the YTPS. Add this line item to the budget justification for stipends to be provided to youth decoys: $5.00/store, $30/day for fieldwork.**

EXCEPTION #6

- Other Costs – Other Agency Defined Sub-Categories, **Food Coupons**: **This RFP requires food/refreshment coupon distribution to youth volunteers participating in the YTPS. Add this line item to the budget justification for food coupons to be provided to youth decoys: $5.00-$15.00 per day.**

EXCEPTION #7

- Other Costs – Other Agency Defined Sub-Categories, **FDB Food Coupons**: **FDB will also provide food in the form of restaurant coupons to youth that participate in FDB STAKE Act inspection operations for the purpose of partnering with the cities of Los Angeles and Santa Ana to conduct YTPS. Add this line item to the budget justification for FDB food coupons to be provided to youth decoys: $15,000 in Year one (1) (FY 2009-10) for 800 inspections.**

Indirect Expenses

These are costs not directly associated with the project's SOW deliverables.

- **Indirect expenses are calculated at a <u>maximum</u> of 25% (twenty-five percent) of the total personnel expenses (salary expenses <u>plus</u> fringe benefits).**

- **Personnel positions that are less than ten (10) percent full time equivalent (FTE) that are not identified in the SOW should be placed in this line item.**

Indirect Expenses-*continued*

- **For more specific information regarding allowable expenses for this line item refer to:**
- **TCFOR webpage**
- **Section IV**
- **Pages 32 & 33**

REMINDER

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

REMINDER

Additional Documents

- ***Proof of Non-Profit Status***
  - **As part of the OTIS application, scan and upload a copy of the document with your proposal that 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 –***
    - **Download and print document from Section VII on the TCFOR webpage.**
    - **This document will also be available in the application of the OTIS website as a "download" that can be printed.**
    - **Scan and upload the completed and signed certification.**

REMINDER

Also refer to:

Supplementary Resources

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

WHAT HAPPENS AFTER YOU APPLY?

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

PROPOSAL REVIEW

- Reviewed & scored by a review panel.
- Scored on a scale of 0 – 100 points.
- Proposals with final consensus score of 75 pts or more will be considered for funding.
- Scores of 75 points or more are <u>not</u> guaranteed for funding or funding at the level requested.

AWARD AND NEGOTIATIONS

Notification of Award

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

Contract Negotiation

- CTCP will 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 3/06/2009, 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, concise and complete.
- 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 the 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 the 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

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 you should 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 **do not** 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.

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 to obtain the required signatures on the Certification of Non-Acceptance of Tobacco Funds.

OTIS TRAINING

Online with OTIS