Welcome to the California Department of Public Health
California Tobacco Control Program

Make Tobacco History
RFA 14-10013

REVIEWER ORIENTATION

March 20, 2014
1:30 to 3:30 p.m. PST

California Tobacco Control Program Presenters

- Request for Application Presentation
  - April Roeseler, Acting Branch Chief
  - Patti Seastrom, Federal Projects Unit Chief
  - Humberto Jurado, Programmer Analyst I, Knowledge Management Unit

Agenda

- Welcome and Introductions: April Roeseler
- Review Logistics: April Roeseler
- Review Process and Timelines
- RFA/Application Overview: April Roeseler & Patti Seastrom
  - Context/History
  - RFA Goals
  - Funding Available
  - Applicant Capability
  - Scope of Work: Intervention and Evaluation Plan
  - Narrative Summary
  - Budget/Budget Justification
- OTIS Review: Humberto Jurado
- Q & A Session: All

I can no other answer make, but, thanks, and thanks. ~*William Shakespeare*

- Thank you for your participation.
- Thank you for your commitment.
- Thank you for your expertise.
- Thank you for your time.
- Thank you for your patience.

Logistics

- Travel Arrangements
- Honorariums
- Conflict of Interest
- Confidentiality
- Reviewer Survey

Review Logistics

- April 2, 2014 (8:30-5:00 p.m.) and April 3, 2014 (8:30 a.m. 5:00 pm)
- Breakfast is from 7:30 a.m. to 8:30 a.m.
- Hilton Sacramento Arden West, 2200 Harvard St., Sacramento. (916) 922-4700
- Food and snacks will be provided for both days.

Travel Arrangements

- Submit the Travel Request form to CSUS CCE Travel Department by 3/14/14.
- Keep all travel receipts to receive reimbursement.
- Only ground transportation & parking at airport will be reimbursed. No reimbursement will be available for rental cars or meals provided at meeting.
- Michela Lombard at CSUS CCE 916.278.2349. mlombard@csus.edu for travel questions.

Honorariums

- Reviewers make the decision on whether they will accept the $150 honorarium.
- Please check your agency's policy on honorariums.
- Payment will be provided after the review.
- Forms to receive honorarium will be provided at the review meeting.

Conflict of Interest Statement

- A conflict of interest is a set of circumstances that creates a risk that professional judgment or actions regarding a primary interest will be unduly influenced by a secondary interest. The following are examples of conflict of interest which would preclude someone from being a reviewer for applications submitted in response to RFA 14-10013: if your agency submits an application in response to this RFA, if you provide consultation or a letter of reference for an application responding to this RFA, if you have ever worked for an applicant agency, or if you or any member of your family would financially or professionally benefit from a specific applicant agency being awarded funds.

- Fax completed form to Patricia.Laija@cdph.ca.gov

- Direct conflict of interest concerns to Richard Kwong A.S.A.P. (916) 449-5475 or via e-mail at Richard.Kwong@cdph.ca.gov.

Confidentiality

- Reviewers must maintain confidentiality regarding plans, scores, discussions, etc.

- Please, no exceptions “What is said in the meeting room during the review, stays in the meeting room.”

Reviewer Feedback

- You will receive an an online survey to evaluate the review process after it is concluded.

- We would like to hear from you on what you liked or didn’t like about both the individual review process and the group review meeting.

Make Tobacco History

The Review Process

The Review Process

- The review group consists of diverse policy, program, statewide, local, evaluation, and budget expertise.
  - 4 Internal Reviewers
  - 4 External Reviewers
- Eight applications total.
- Each application will be read and individually scored by 4 people (Submit your scores by **March 31, 2014**).
- Each application will be discussed and rated by the group to arrive at a single **CONSENSUS** score with supporting comments.
- Non-scoring reviewers may contribute to the discussion.

The Miracle of the OTIS Review Process

- OTIS provides multiple ways to take notes
  - Downloadable Paper Tool
  - Electronic Notes – you can transfer into the review tool (or cut and paste between applications)
  - Direct Data Entry to the Database
- OTIS adds up your scores
- OTIS generates a readable report – no, “I can’t read my hand writing.”

Scoring & Comments

- If full points are not given, you must provide comments.
- Comments should address how the application fails to meet the requirement.
- In the review group you will be asked to discuss your score and the comments that support the score.

1. Program and Evaluation Experience

   Do the Applicant and principal staff demonstrate three years of experience working on tobacco control issues in California performing work on a statewide basis related to health promotion policies, regulation and community norm change strategies?

Score: -- Select One --

Comments:

Scoring (page 16)

- Each eligible application will be evaluated and scored according to the selection criteria by a review committee.
- Applications will be scored on a scale of 0 to 100 points,
- Applicants receiving a score of 75 points or more will be considered for funding.
- Receiving a score of 75 points or more does not guarantee funding.

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

California Tobacco Control Program

Contact Us | FAQ

Funding Opportunities and Resources

Funding Opportunities | Project Directory | Evaluator Directory | CTCP Websites

The California Tobacco Control Program (CTCP), California Department of Public Health (CDPH) 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.

TCFOR Home | Funding Opportunities | Project Directory | LPE Directory | CTCP Websites
Contact Us | Privacy Policy | FAQ

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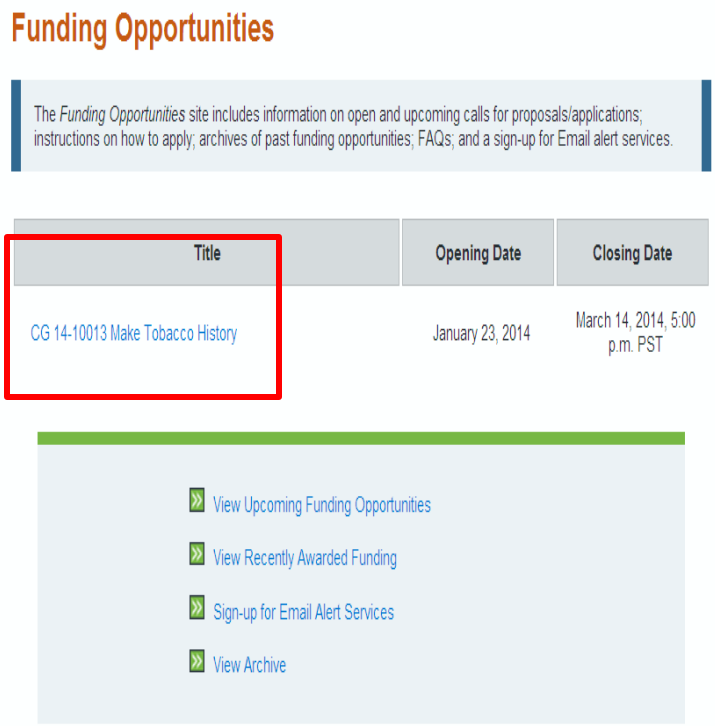
TCFOR: Getting Started

- **Access RFA Documents at: tcfor.catcp.org**
  - RFA
  - Application Information
  - Contract Documents
  - Meetings/Trainings
  - Eligibility & Selection Criteria
  - Key Dates
  - Total Award
  - Related Materials
  - Presentation Slides



Application Information

- *New* January 31, 2014: Addendum 1 Letter (PDF - 275.75 Kb)
- *New* Addendum 1: 14-10013 Make Tobacco History RFA (PDF - 0.38 Mb)
- CG 14-10013 Make Tobacco History (PDF - 0.57 Mb)
- Appendix 1a - Sample Internal Revenue Service Letter (PDF - 16.72 Kb)
- Appendix 1b - Sample Secretary of State, Statement of Information (PDF - 0.87 Mb)
- *New* Appendix 2 - Mandatory Letter of Intent Revised (PDF - 56.65 Kb)
- Appendix 3 - TCFOR User Instructions (PDF - 0.84 Mb)
- Appendix 4 - Accessing the OTIS Training Course (PDF - 173.64 Kb)
- Appendix 5 - Computer Software Minimum Specifications (PDF - 98.23 Kb)
- Appendix 6 - Midwest Academy Strategy Chart (PDF - 388.99 Kb)
- Appendix 7 - Tell Your Story, Guidelines for Preparing A Complete, High Quality Evaluation Report (PDF - 0.86 Mb)
- *New* Appendix 8 - Budget Justification Instructions Revised (PDF - 309.13 Kb)
- Appendix 9 - Summary Budget by SOW Categories Eliminated
- Appendix 10 - CTCP PL 12-01 ACM and BMM Guidelines (PDF - 0.52 Mb)
- Appendix 11 - Comparable State Civil Service Classifications (PDF - 12.08 Kb)
- Appendix 12 - CTCP PL 12-03 Allowed Policy Activities (PDF - 121.33 Kb)
- Appendix 13 - Travel Reimbursement Information Eliminated
- *New* Appendix 13a - Meals and Incidental (In-State/Out of State Travel) (PDF - 351.26 Kb)
- *New* Appendix 13b - Lodging Reimbursement - Short Term Travel (PDF - 36.20 Kb)
- *New* Appendix 13c - Travel/Relocation Programs - 2014 Mileage Reimbursement Rate for Use of Personal Vehicle (PDF - 42.39 Kb)
- Appendix 14 - Certification of Non-acceptance of Tobacco Funds (PDF - 7.88 Kb)
- Appendix 15 - Sample SOW Implementation and Evaluation Plan (PDF - 0.62 Mb)

Contract Documents

Meetings/Trainings

Key Dates

Total Award

Contact

Related Materials

Helpful documents to review prior to scoring the application

Make Tobacco History RFA Purpose (page 2)

- Fund 1 to 4 projects that will research, plan, develop, and disseminate innovative policy, regulation, and promising community norm change strategies which can be replicated by others to create healthy sustainable communities which dissuade tobacco use.
- Innovative strategies must use a population-based approach and facilitate reducing the numbers of persons beginning to use tobacco, continuing to use tobacco, or developing tobacco-related disease

Make Tobacco History RFA Purpose (page 2)

- Beneficiaries of activities must be person and groups at high risk for tobacco use and SHS exposure and the local California public health community, e.g., local health depts., planning agencies, local govt. officials, local decision makers, schools, voluntary health organizations, hospitals, professional organizations, and CBOs working with persons and groups at high risk for tobacco use and SHS exposure.

Make Tobacco History RFA Purpose (page 2)

- In performing activities the benefit must be local communities or to assist the local public health community in the performance of their service to others.

- It may not be for the provision of services to the State nor may it be for the provision of services to organizations whose mission is not in alignment with the applicant's.

Make Tobacco History RFA Goals (page 2)

- Easy access to health promoting, innovative and evidence-based tobacco policy, regulation and community norm change strategies to reduce the number of persons beginning tobacco use, continuing to use tobacco, or developing tobacco related diseases.
- Have easy access to specific and customized education, knowledge, skills, and tools needed to facilitate the health promoting, policy, regulation, and community norm change strategies.

Make Tobacco History RFA Goals (page 2)

- Implement innovative strategies to address the specific needs and populations of their communities. The strategies will be customizable so that local communities can target high risk persons and groups.
- Effectively organize and empower the high risk persons and groups in their community to effect change.

Funding Amount (page 4)

- Anticipated funding available is $6 million to fund one to four projects for five years.

- Any single grant award will not exceed $700,000 per year.

- Note: Insufficient funds are available to fund four grants at $700,000 per year

  ($300,000/year x 5 years x 4 grants = $6,000,000)

Grant Term (page 4)

- July 1, 2014 – June 30, 2019

- Applications must be for the entire five year period and may not exceed $700,000 per year.

What you will be reviewing

- Sections to be Rated and Provide Comments:
  - Agency Capability **(39 pts.)**
  - Scope of Work - Intervention **(21 pts.)**
  - Scope of Work - Evaluation **(10 pts.)**
  - Narrative Summary **(10 pts.)**
  - Budget/Budget Justification **(20 pts.)**
- **100 pts. total**
- Passing Score **(75 or more)**
- Overall Strengths and Weaknesses

Reviewing Tips

- Find a style of taking notes-either on paper, electronic notes, or direct entry and stick with it.
- Do not immediately hit the submit button after reviewing an application—as you review you may find something in one application that makes you want to go back and revisit your score.
- Strive for consistency – if the SOW doesn't match the narrative and you decide to deduct one point for that oversight—then apply that rule to every application.
- Don't obsess over perfection– every reviewer brings a different eye to the process and the point of the group discussion is to discuss differences and come to a CONSENSUS.
- Suggested Reports to bring with you: Applicant Capability, Combined SOW, Budget Justification

Applicant Capability (pages 8-11)

- Applicant Capability

☐Narrative
  o Program and Evaluation Experience
  o Organizational Start-Up
  o Administrative/Fiscal Experience
  o Equipment Available to the Project
☐Letters of Reference
☐Evaluator Information
  o Evaluator Qualifications
  o Evaluator Certification

Applicant Capability Rating Criteria (pages 18-22)

- Program and Evaluation Experience

Criterion	Point Value
The Applicant and principal staff has three years of experience working on tobacco control issues in California performing work on a statewide basis related to health promotion policies, regulation and community norm change strategies.	4
The Applicant demonstrates that its mission, types of programs and services are consistent with the goals of this RFA and CTCP's mission; the targeted audiences, groups and organizations that the agency typically works with to fulfill its mission demonstrates the ability to coordinate and collaborate with diverse partners such as: local health departments, cities, local planning agencies, local governmental officials, local decision makers, schools, colleges/universities, voluntary health organizations, hospitals, professional organizations, and community based organizations.	5
The Applicant demonstrates the ability to educate the local California public health community and groups working with persons at high risk for tobacco use and secondhand smoke exposure about the promising and innovative policy, regulatory, or community norm change strategies, allowing those communities to replace the approaches to dissuade tobacco use.	5
The Applicant demonstrates that staff have the necessary education, training and experience needed to plan, implement and evaluate the described project.	4
The Applicant demonstrates past effectiveness and capacity in providing tobacco education and the ability to serve populations and areas with substantial unmet service needs.	4

Applicant Capability Rating Criteria* (pages 18-22)

- Letters of Reference

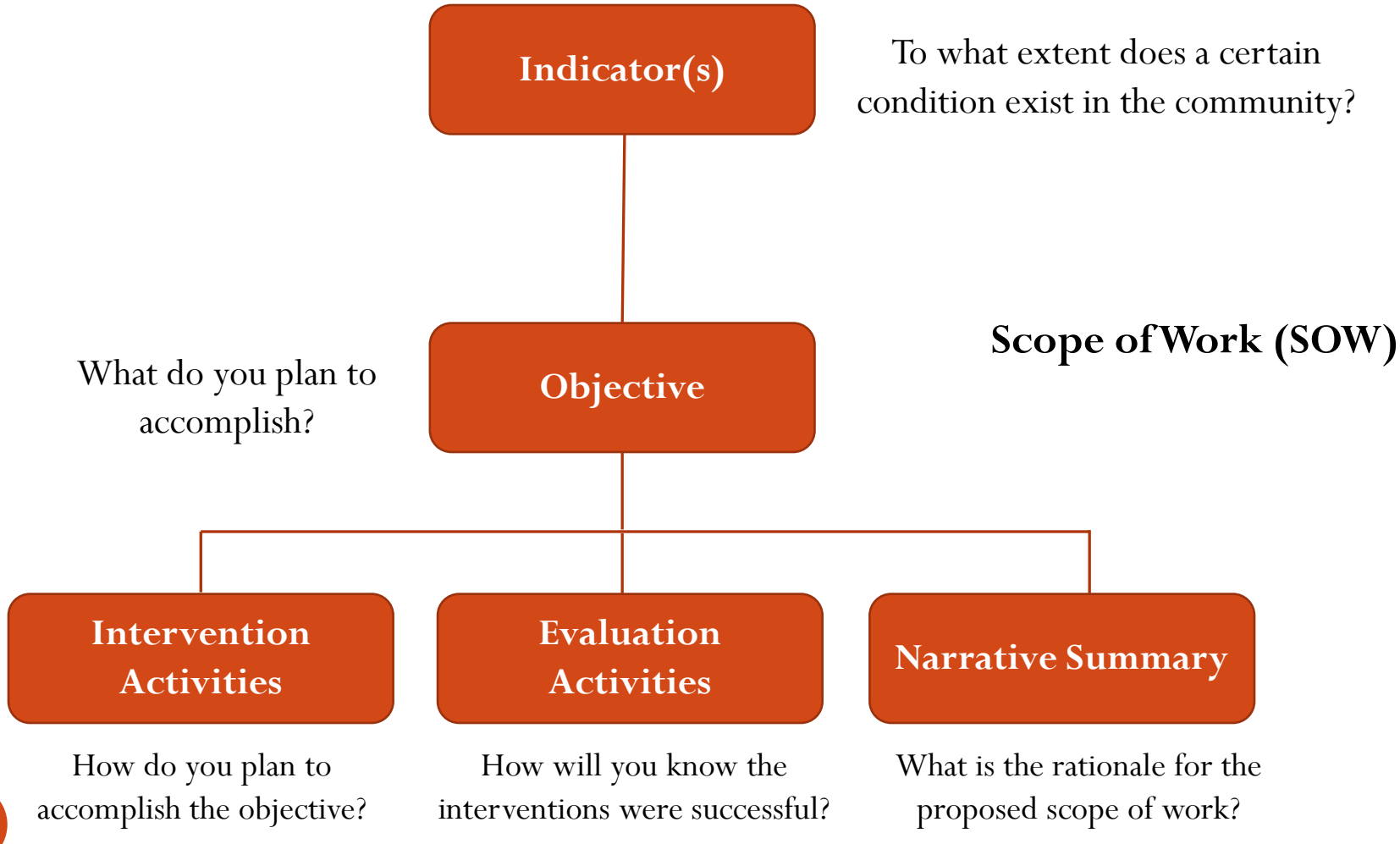
Criterion	Point Value
The letters demonstrate that the Applicant agency has successfully and satisfactorily: 1) managed grant or contract funds; 2) has the capacity to successfully fulfill the activities and functions identified in the Project Description; 3) has established positive collaborative relationships with targeted audiences, groups, organizations, institutions, .and communities identified in the scope of work.	4

- Evaluator Information: Evaluator Qualifications/ Evaluator Certification

Criterion	Point Value
Demonstrates that a qualified program provided at least four hours of consultation on the development of objectives and the evaluation plan and that a qualified evaluator will facilitate implementation of the evaluation activities.	2

* Not all Applicant Capability criteria shown

Scope of Work and Narrative



SOW: Intervention Activity Plan (pages 20-21)

2. SOW: Intervention Activity Plan (Total Points: 21)

Criterion	Point Value
The objective(s) clearly defines who or what is expected to change; how much change is expected to occur (without including ranges); where the change is expected to occur; and when the change is expected to occur.	2
The Application provides a well-organized, detailed and comprehensive Intervention Activity Plan that accurately describing target audiences and intervention topics, how much work will be done, and where activities will occur. The target audience and beneficiaries of described activities include: persons and groups at high risk for tobacco use and secondhand smoke exposure and the local public health community of California (e.g. local health departments, cities, planning agencies, local government officials, local decision-makers, schools, voluntary health organizations, and community based organizations working with persons and groups at high risk for tobacco use and secondhand smoke exposure).	4

SOW: Intervention Activity Plan (pages 20-21)

Proposed activities demonstrate an understanding of the role community norms have in influencing behavioral change regarding tobacco use.	5
Proposed activities will facilitate: a) Easy access to health promoting, innovative, and evidence based tobacco policy, regulation, and community norm change strategies aimed at reducing the number of person beginning tobacco use, continuing to use tobacco, or developing tobacco related diseases. b) Easy access to knowledge, skills, and needed to facilitate the implementation of health promoting policy, regulation, and community norm change strategies among target audiences. c) Implementation of innovative strategies to address the specific needs and populations of their communities. d) Effective organizing and empowering of high risk persons and groups to affect community change.	6
The project is designed to utilize and enhance existing services and resources without duplicating or supplanting state or federal funding.	4

Evaluation Plan (pages 12-13)

- Evaluation design
- Evaluation activities which describe the sampling strategy, sample size, data collection methods, target audiences, data analysis, and dissemination of findings.
- Evaluation reporting
- Dissemination of findings
- Start/End Dates
- Tracking Measures
- Responsible Parties

Evaluation Plan Rating Criteria (page 21)

3. SOW: Evaluation Plan (Total Points: 10)

Criterion	Point Value
The evaluation measures the extent to which the objective(s) was/were achieved and disseminates the findings to the community, key opinion leaders, or public health professions working in tobacco control as appropriate.	5
The evaluation includes activities to measure impact, reach, and quality improvement.	5

Narrative Summary (page 13)

- Community Assessment Analysis
- Describes the Major Intervention Activities
- Summarizes activities and why they were selected
- Theory of change—why this should work
- How it will be evaluated

Narrative Summary Scoring Criteria (pages 21-22)

4. Narrative Summary (Total Points: 10)

Criterion	Point Value
In the Community Assessment Analysis data, community needs assessment findings, and other information are synthesized, provide justification for the indicators selected and the objective identified, and the analysis is appropriate for the identified community(ies) of focus and addressed tobacco-related inequities.	4
The Major Interventions Activities narrative provides reasonable, realistic, and appropriate intervention activities that build on each other to achieve the objective(s).	2
The Theory of Change narrative provides a reasonable rationale that explains why the proposed activities should lead to the accomplishment of the objective(s).	2
The Evaluation Summary narrative provides reasonable, realistic, and appropriate evaluation design and activities for each objective including sampling strategy, sample size, type of evaluation activities proposed, data collection methods, data analysis, and dissemination of findings that will assess the quality and quantity of services provided.	2

Make Tobacco History
Reviewer Instructions – Budget

Patti Seastrom, Chief

Federal Projects Unit

California Tobacco Control Program

Basics of Grant Budgeting

- Grants are a gift of public funds
- Grantees will only be reimbursed for actual expenses resulting from the SOW activities; however, ….
- Grantee may not be limited to line item budget amounts, only to the annual totals.

Scoring Grant Application Budgets

- Applicants' budgets ensure the grantee has thoroughly anticipated expenses associated with the SOW.

- Your job as a reviewer is to determine the viability and reasonableness of the applicant's budget and justification.

- Does the applicant's budget position the grantee to complete activities, accomplish objective(s), and make good use of public funds?

What You'll Need to Score Budgets

- 14-10013 Request for Applications (TCFOR)
  - Page 14, G. Budget and Budget Justification
  - Addendum 1
- Appendix 8, Budget Justification Instructions (TCFOR)
- Applicant's 5 year budget justification (OTIS)
- Budget scoring criteria from (OTIS)

RFA 14-10013 Budget Scoring Criteria

CRITERION	POINT VALUE
Budget amounts associated with the implementation of the SOW were determined for each FY.	5
Budget amounts associated with the implementation of the SOW are supportable and reasonable when compared to the description of the SOW activities.	15

RFA 14-10013 Budget and Budget Justification (p. 14)

- Develop a five-year budget that identifies the cost associated with the implementation of the SOW.
- Adhere to the instructions and criteria provided in this section and the budget instructions and guidelines provided in: *Appendix #8: Budget Justification Instructions,* the OTIS Wizards, and the OTIS web-based training unit: *Creating Your Application/Plan*; module: *Budget*.
- Utilize the eight budget categories provided in the OTIS budget justification index.
- Verify that each activity in the SOW resulting in an expenditure of funds is reflected in the budget.

RFA 14-10013 Budget and Budget Justification, cont. (p. 14)

- Develop a budget justification that clearly describes how the costs identified for each FY were determined.
- Provide easy to follow formulas to substantiate how costs were calculated.
- Provide an explanation when zero funds or insufficient funds are budgeted for a standard cost (i.e., in-kind personnel or rent).
- Provide an explanation when costs vary per FY.

RFA 14-10013 Budget and Budget Justification, cont. (RFA p. 14)

- "Budget recommendations for this solicitation:
  - Designate 10 percent of 1 full-time equivalent (FTE) lead staff person's time to provide oversight for the project evaluation. Provide a statement in the personnel duty description that 10 percent of 1 full-time equivalent lead staff person's time will be dedicated to providing oversight of the project evaluation (must equal 4 hours per week minimum)."

RFA 14-10013 Budget Requirements, cont. (RFA p. 14)

- "Budget recommendations for this solicitation:
  - Recommended CTCP Trainings – below are the recommended trainings that should be included in your budget. The fiscal year the trainings will be held are noted along with an estimated amount to budget. Assume all CTCP required trainings will take place in Sacramento, and budget according to applicant's geographical proximity.
    - Capitol Information & Education Days (I&E Days) are currently scheduled for FY 2014-15 (Spring), FY 2015-16 (Spring) and FY 2016-17 (Spring). Budget $750 per person for each I&E Days.
    - Project Director's Meeting (PDM) - currently scheduled for FY 2015-16 (Fall) and FY 2016-17 (Spring). Budget $1,250 to $1,350 per person for each PDM."

RFA 14-10010 Budget Scoring Questions/Point Values

1. **Were the budget amounts associated with the implementation of the SOW determined for each fiscal year?**

Not Demonstrated	Somewhat Demonstrated	Demonstrated
0 ☐	1 ☐ 2 ☐ 3 ☐ 4 ☐	5 ☐

Comments: Click here to enter text.

2. **Are the budget amounts associated with the implementation of the SOW supportable and reasonable when compared to the description of the SOW activities?**

Not Demonstrated	Somewhat Demonstrated	Highly Demonstrated
0 ☐	1☐ 2☐ 3☐ 4☐ 5☐ 6☐ 7☐ 8☐	9☐ 10☐ 11☐ 12☐ 13☐ 14☐ 15☐

Comments: Click here to enter text.

BUDGET JUSTIFICATION (Total Score: _____ [0-20 Points])

What to Avoid When Scoring a Grant Budget

- Taking points off for:
  - Insignificant math/formula/entry errors
  - Incomplete/confusing description for an insignificant cost item
- Focusing on the details of any single category, line item, or sub-line item without the context of the SOW or the bigger budget picture

8 Budget Line Items

- Personnel
- Fringe Benefits
- Operating Expenses
- Equipment
- Subcontractors/Consultants
- Travel
- Other costs (educational materials, behavior modification materials, stipends, paid media, booth/facility rental)
- Indirect Expenses

Instead, focus on:

- Big picture budget
- Reasonableness of budget
- Practicality of budget
- Adequacy of annual budgets
- SOW activity costs
- How well does this budget position the applicant to achieve the stated objectives?
- Is this budget a supportable expenditure of public funds?

Are SOW Costs Reflected in Budget?

Activity:	Provide 20-40 behavior modification materials such as gift cards for field test participants, and/or for participants completing the online course. BMM are provided to program participants to motivate and/or reinforce positive behavior, participation, and/or involvement in tobacco control activities and requires action on the part of the recipient to receive the BMM. The cost of the BMM may not exceed $50 in value, per person, per year and shall not include gift cards that can be used to purchase tobacco or alcohol.
Intervention Category:	Behavior Modification Materials
Copyright:	No
Program Deliverable Percentage:	0.00 %
Start Date Period:	07/13-12/13
Completion Date Period:	01/15-06/15
Tracking Measures:	**Measure** / **Submit** Material Distribution Log / Yes
Responsible Parties:	**Responsible Party** / **Budget Type** Senior Program Director / Budgeted

Title: Behavior Modification Materials **Description:**	$0	$0	$0

Test Your Understanding

Would you take points off? How many?

- Typos
- Math errors
- Formulas are incomprehensible
- Descriptions are not clear
- Salaries exceed comparable state classifications
- Behavior modification materials description is missing required language about $50/person limit, etc.
- Project staffing totals 0.75 FTE
- Fringe benefits are 68% of salaries
- Subcontractors/Consultants are 60% of budget
- Travel costs are 35% of budget
- Mileage reimbursement rate is $0.60/mile
- Equipment costs are 10% of budget
- Evaluator cost is 40% of budget
- Budget Justification is one hot mess

RFA 14-10010 Budget Scoring Questions/Point Values

1. **Were the budget amounts associated with the implementation of the SOW determined for each fiscal year?**

Not Demonstrated	Somewhat Demonstrated	Demonstrated
0 ☐	1 ☐ 2 ☐ 3 ☐ 4 ☐	5 ☐

Comments: Click here to enter text.

2. **Are the budget amounts associated with the implementation of the SOW supportable and reasonable when compared to the description of the SOW activities?**

Not Demonstrated	Somewhat Demonstrated	Highly Demonstrated
0 ☐	1☐ 2☐ 3☐ 4☐ 5☐ 6☐ 7☐ 8☐	9☐ 10☐ 11☐ 12☐ 13☐ 14☐ 15☐

Comments: Click here to enter text.

BUDGET JUSTIFICATION (Total Score: _____ [0-20 Points])

RFA 14-10013 Budget Requirements, cont. (p. 15)

"Additional Budget Justification information may be obtained in the following Appendices:

- Appendix 5: *Computer Software Minimum Specifications*
- Appendix 10: *CTCP PL 12-01 ACM and BMM Guidelines*
- Appendix 11: *Comparable State Civil Service Classifications*
- Appendix 12: *CTCP PL 12-03 Allowed Policy Activities*
- Appendix 13A-C: *Travel Reimbursement Information* "

OTIS
Reviewer Process

20 March 2014
Humberto (Beto) Jurado
Humberto.jurado@cdph.ca.gov

Overview

- **Option 1 - Report and Worksheet**
- **Option 2 – Reports and Simultaneously input**
- **Option 3 – Review Note tool and Review Notes**

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For technical assistance, please contact Humberto.jurado@cdph.ca.gov or call (916) 449-5474

MyOTIS | My Projects | Calendar | Announcements | Quick Links | Directories | Help

Welcome to OTIS!

The OTIS Online System helps streamline the process to create, submit, and review applications. After your plan is approved, you will continue to use OTIS for progress and cost reporting and for communications with CTCP staff.

The following Quick Reference Guide provides a snapshot of some key resources and features to help you get started in OTIS:

Quick Reference Guide

Getting Started	The Getting Started video is the first module in the OTIS Applicant Training Course. It provides an overview of the major components and workflow process of submitting an application using OTIS.
Help	The Help section (top navigation bar) provides links to FAQ, Online Training, Glossary, Documents, User Manuals, Request Technical Assistance, and CTCP Contacts.
Directories	The Directories section links to directories for funded Projects, Evaluators, and your Agency Contacts.
User Account	Your User Account information is located in the top right- hand corner in the dropdown next to your name. Here you can update your email address and phone number as well as change your password.
MyOTIS	The MyOTIS page serves as an alerts dashboard for all of your funded projects. This page also provides you access to utilities such as the Communication Log and Subcontract agreements.

Technical Configuration Tips

Tip:	This website utilizes pop-up windows at various times. Please be sure to either disable your pop-up blocker or register the website URL as an exception to your pop-up blocker.
Tip:	This website was developed to be compatible with Internet Explorer (versions 8 and above) with compatibility mode turned off. If you have problems viewing this website please make sure your browser meets this requirement.

☐ Do not show this page anymore.

Continue >

OTIS California Tobacco Control Program
Online Tobacco Information System

Welcome, Jack Frost! Messages (0)
Logged in as: Applicant

MyOTIS | My Projects | Calendar | Announcements | Quick Links | Directories | Help

Change your Login status to Peer Reviewer

Applicant

- MyOTIS Dashboards
  - Alerts
  - My Projects
- Utilities
  - Agency Contact Directory
  - Communication Log

Peer Reviewer

Alerts

Action Items

CG 14-10010 Reduce Tobacco-Related Inequities: Test Procurement Build
Application Open - Due: 01-09-2014

CG 14-10013 Make Tobacco History : Test Agency 2
Application Open - Due: 03-14-2014

CG 14-10013 Make Tobacco History : Test Procurement Build
Application Open - Due: 03-14-2014

Projects

Agency	Project	Contacts
CG 14-10010 Reduce Tobacco-Related Inequities Interventions		
CG 14-10013 Make Tobacco History		

Communications

0 New Messages
0 New Official Messages
0 Help Request
0 Saved Messages

Calendar

March 2014

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

Mar 18, 2014
Prop 99 call
State

Mar 24, 2014
Youth Quest
State

OTIS
California Tobacc
Online Tobac
Welcome, Jack Frost! Messages (0)
Logged in as: Peer Reviewer
MyOTIS
My Projects
Calen
Quick Links
Directories
Help
You should now be viewing the Peer Reviewer page with all the asigned procurements displayed in the "My Projects" panel.
Applicant
Peer Reviewer
MyOTIS Dashboards
My Projects
Projects
Project List by Procurem
View ARCHIVED Projects
Agency
Project
Plan Status
Progress Status
Cost/Invoice Status
Action(s)
CG 14-10013 Make Tobacco History
MyOTIS · My Projects · Calendar · Announcements · Help · My Account · FAQs · Logout
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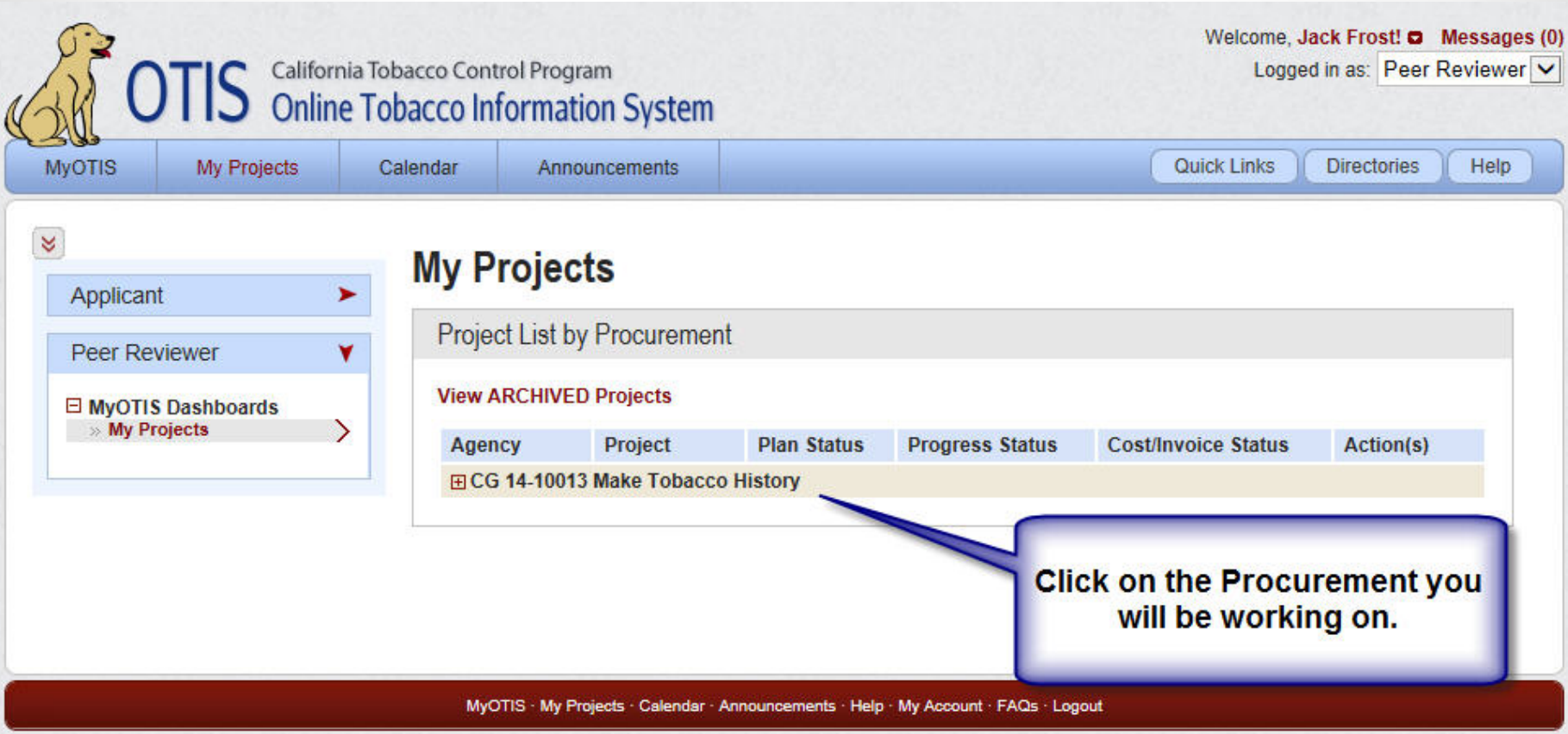

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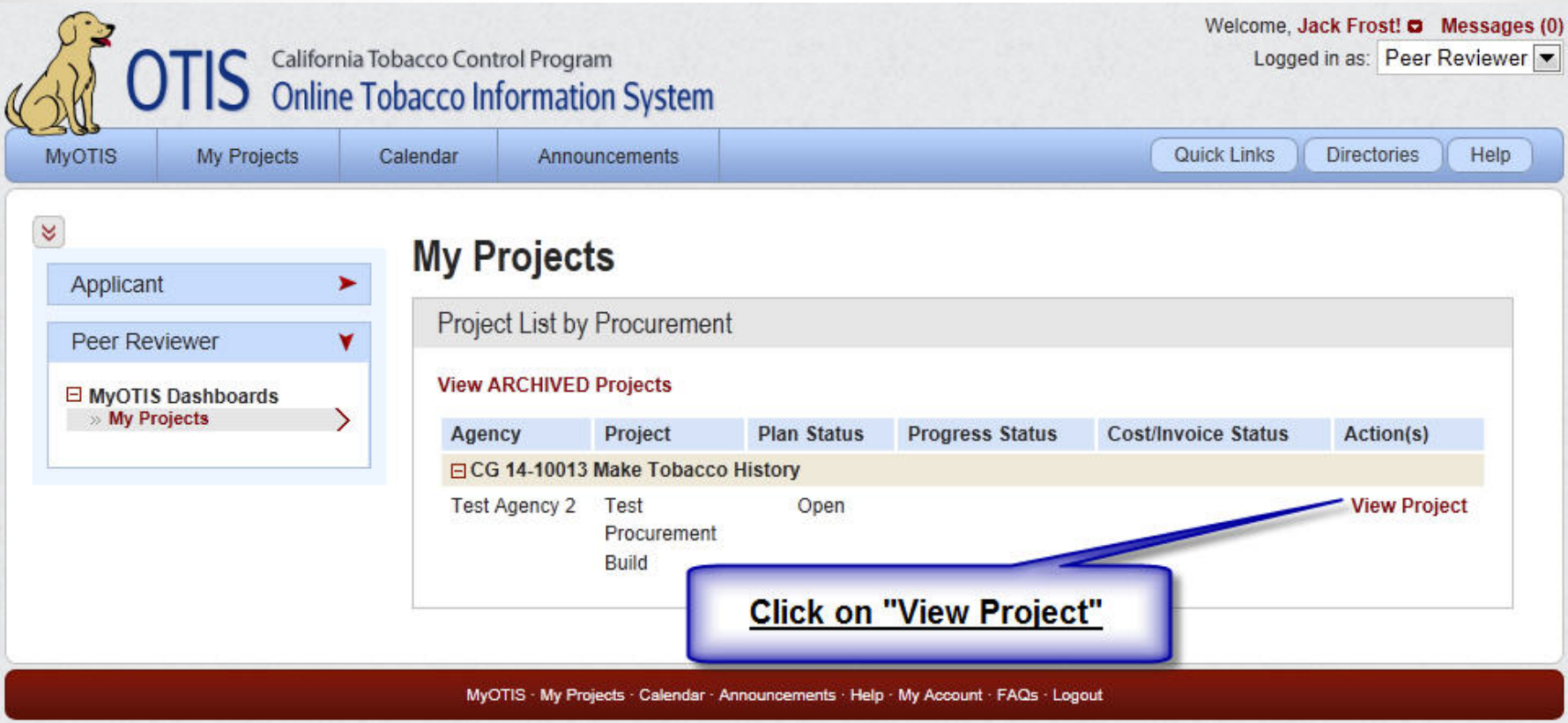
OTIS
California Tobacco Control Program
Online Tobacco Information System
Welcome, Jack Frost! Messages (0)
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Directories
Help
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My Projects
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Plan Status
Progress Status
Cost/Invoice Status
Action(s)
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Test Agency 2
Test Procurement Build
Open
View Project
Click on "View Project"
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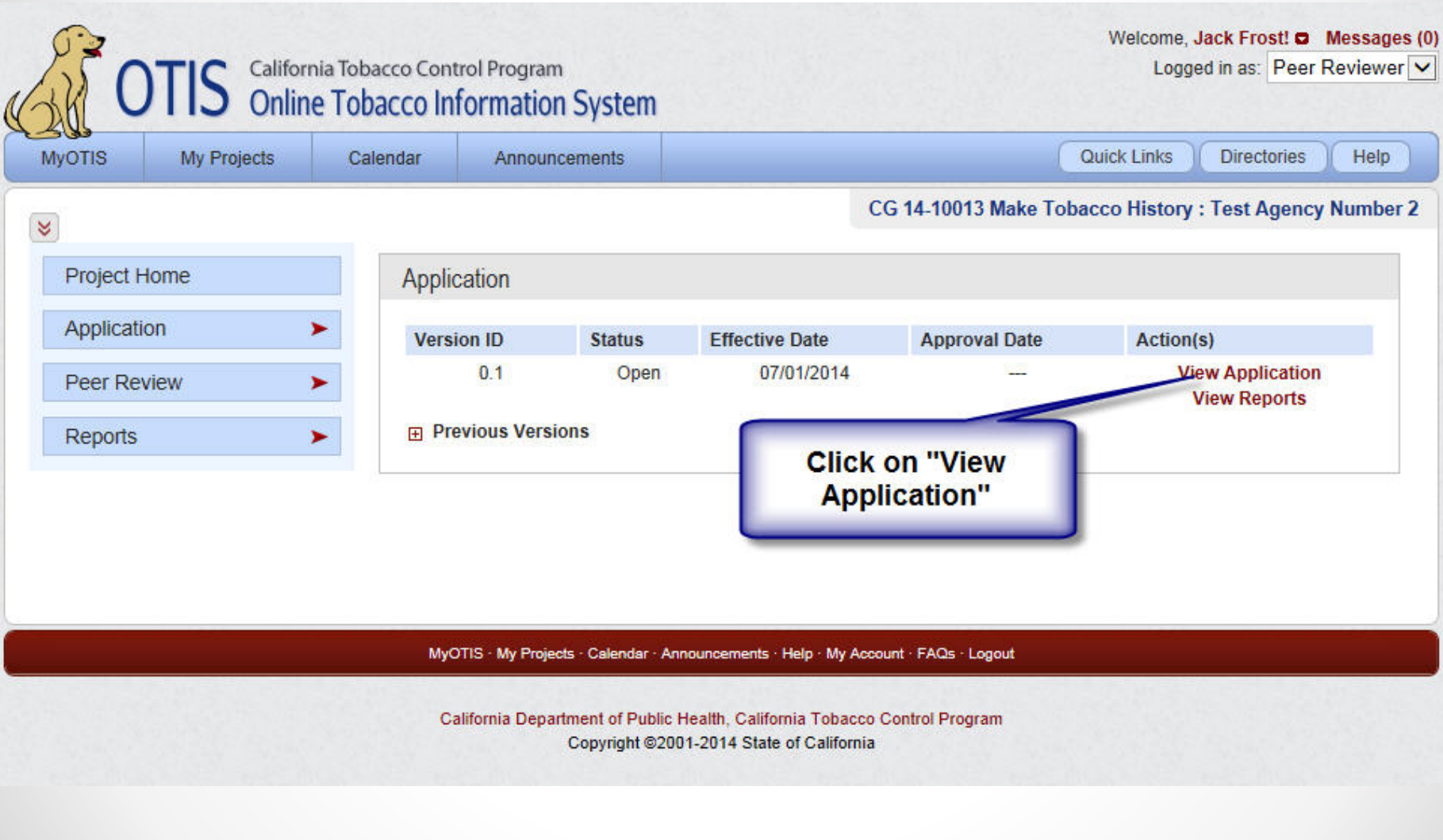
OTIS
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Welcome, Jack Frost! Messages (0)
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Reports
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Version ID
Status
Effective Date
Approval Date
Action(s)
0.1
Open
07/01/2014

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  - Budget Information
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Agency Signatory	Open	View
Background Information		
Applicant Capability	Open	View
Evaluator Information		
Evaluator Selection	Open	View
Scope of Work		
Objective : By January 08, 2014, the City of San Diego developments built within the existing redev 100% smoke-free and all new low and low- requiring 50% of all units be totally smok...	Open	View
Objective : By , a minimum of 75% of locally-elected LGBT officials or those running for office in California will pledge not to accept tobacco funding or donations.	Open	View
Budget Information		
Budget Justification	Open	View
Additional Documents		
Additional Tobacco Control Funding	Open	View
Administrative/Collaborative Activities	Open	View
Proof of Non-Profit Status	Open	View
Certification of Non-Acceptance of Tobacco Company Funds	Open	View

You are now in the "Application Index" of the agency you will be reviewing.

CG 14-10013 Make Tobacco History : Test Agency Number 2

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Agency Signatory	Open	View
Background Information		
Applicant Capability	Open	View
Evaluator Information		
Evaluator Selection	Open	View
Scope of Work		
Objective : By January 08, 2014, the City of San Diego will pass a policy whereby all new affordable housing developments built within the existing redevelopment areas with tax increment money will be 100% smoke-free and all new low and low-moderate housing developments will have a policy requiring 50% of all units be totally smok...	Open	View
Objective : By , a minimum of 75% of locally-elected LGBT officials or those running for office in California will pledge not to accept tobacco funding or donations.	Open	View
Budget Information		

Click on the "Peer Review" tab.

CG 14-10013 Make Tobacco History : Test Agency Number 2

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Peer Review

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- Applicant Capability
- Scope of Work: Intervention Activity Plan
- Scope of Work: Evaluation Plan
- Narrative Summary

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Applicant Capability	Open	View
Evaluator Information		
Evaluator Selection	n	View
Scope of Work		
Objective : By January 08, 2014, the City of San Diego will pass a policy whereby all new affordable housing developments built within the existing redevelopment areas with tax increment money will be 100% smoke-free and all new low and low-moderate housing developments will have a policy requiring 50% of all units be totally smok...	n	View
Objective : By , a minimum of 75% of locally-elected LGBT officials or those running for office in California will pledge not to accept tobacco funding or donations.	Open	View
Budget Information		

Click the "Download Review Tool" to open and print the Tool.

Agency Name: Click here to enter text.

CALIFORNIA DEPARTMENT OF PUBLIC HEALTH, CALIFORNIA TOBACCO CONTROL PROGRAM (CDPH/CTCP)
INDIVIDUAL REVIEW TOOL
REQUEST FOR APPLICATION (RFA) CTCP 14-10013
MAKE TOBACCO HISTORY

Reviewer's Initials:	Click here to enter text.	Name of Applicant:	Click here to enter text.
Date:			Click here to enter text.
Annual Funding Allocation:			Click here to enter text.

A PDF window will open, You will notice the title indicating the procurement and the "Scoring Sections" and click on Print.

Scoring Sections	**Points**	**Points**
I. Applicant Capability	39	Click here to enter text.
II. Scope of Work: Intervention Activity Plan	21	Click here to enter text.
III. Scope of Work: Evaluation Plan	10	Click here to enter text.
IV. Narrative Summary	10	Click here to enter text.
V. Budget Justification	20	Click here to enter text.
Total	100	Click here to enter text.

☐ **Pass (Score of 75 or greater)** ☐ **Fail (Score of 74 or less)**

CG 14-10013 Make Tobacco History : Test Agency Number 2

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- Budget Information
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- Application Submission

Peer Review

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Reports

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Applicant Capability	Open	View
Evaluator Information		
Evaluator Selection	Open	View
Scope of Work		
Objective : By January 08, 2014, the City of San Diego will pass a policy whereby all new affordable housing developments built within the existing redevelopment areas with tax increment money will be 100% smoke-free and all new low and low-moderate housing developments will have a policy requiring 50% of all units be totally smok...	Open	View
Objective : By , a minimum of 75% of locally-elected L will pledge not to accept tobacco funding or	Open	View
Budget Information		
Budget Justification	n	View
Additional Documents		
Additional Tobacco Control Fundin	n	View
Administrative/Collaborative ivities	Open	View
Proof of Non-Profit S us	Open	View
Certification on-Acceptance of Tobacco Company Funds	Open	View

Option 1 - Click on the Reports Tab > Application > Version 0.1.

Peer Review

Reports

- Application
  - Report Index
  - Version 0.1

MS Word 2000 or later is needed for proper viewing of the Word version of the reports.

Many of these reports are better printed in Landscape format. The print format orientation may usually be changed from the 'Page Setup...' or 'Printer Settings' dialog in the application which is being used to print the report.

After loading a Word 2000 report, you may need to change the view from a Web layout to a print layout. You change the layout from the View menu.

Title	View Type		
Agency Certification			
Agency & Contract Information			
Contact Information			
Correspondance Contacts			
Applicant Capability			
Local Program Evaluator			
Scope of Work: Overview & Intervention Activities			
Scope of Work: Overview & Evaluation Activities			
Scope of Work: Narrative Summaries			
Scope of Work: Deliverable Percentages			
Scope of Work: Objective ID			
Scope of Work: Objective ID			
Combined Scope of Work			
CMU -- Scope of Work, Exhibit A			
Budget Summary			
Budget Justification			
CMU -- Individual Budget Year 1			
CMU -- Individual Budget Year 2			
CMU -- Individual Budget Year 3			
CMU -- Individual Budget Year 4	Web	Web (Black & White)	Word 2000
CMU -- Individual Budget Year 5	Web	Web (Black & White)	Word 2000
Additional Tobacco Control Funding	Web	Web (Black & White)	Word 2000
Administrative/Collaborative Activities	Web	Web (Black & White)	Word 2000
Project Abstract	Web	Web (Black & White)	Word 2000
Individual Peer Review	Web	Web (Black & White)	Word 2000

As a reviewer you will be reviewing the following sections of the Application:

Applicant Capability
Scope of Work Overview and Interventions Activities
Scope of Work Overview and Evaluation Activities
Scope of Work Narrative Summaries
Budget and Budget Justification

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
Correspondance Contacts	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: 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
CMU -- Individual Budget Year 4		Web (Black & White)	Word 2000
CMU -- Individual Budget Y		lack & White)	Word 2000
Additional Tobacco Contro		lack & White)	Word 2000
Administrative/Collaborativ		lack & White)	Word 2000
Project Abstract		lack & White)	Word 2000
Individual Peer Review		lack & White)	Word 2000

Click on the Web or Web (Black & White) and print out the report,

OTIS California Tobacco Control Program
Online Tobacco Information System

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Report Index

Application Reports

MS Word 2000 or later is needed for proper viewing of the Word version of the reports.

Many of these reports are better printed in Landscape format. The print format orientation may usually be changed from the 'Page Setup...' or 'Printer Settings' dialog in the application which is being used to print the report.

After loading a Word 2000 report, you may need to change the view from a Web layout to a print layout. You change the layout from the View menu.

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
Correspondance Contacts	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

Click on the Peer Review Tab

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Agency Signatory	Open	View
Background Info		
Applicant Capacity	Open	View
Evaluator Information		
Evaluator Selection	Open	View
Scope of Work		
Objective : By January 08, 2014, the City of San Diego will pass a policy whereby all new affordable housing developments built within the existing redevelopment areas with tax increment money will be 100% smoke-free and all new low and low-moderate housing developments will have a policy requiring 50% of all units be totally smok...	Open	View
Objective : By , a minimum of 75% of locally-elected LGBT officials or those running for office in California will pledge not to accept tobacco funding or donations.	Open	View
Budget Information		
Budget Justification	Open	View
Additional Documents		

Go through the Peer Review Sections to input your comments and scores

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Applicant Capability

Edit Applicant Capability Review

RFA references for scoring this section include:
Section II, Application Requirements, p. 7
Section III, Instructions for Completing the Application and for Using the Online Tobacco Information System (OTIS), pp. 8-11
Section IV, Application Selection Process and Criteria, pp. 18-20

1. Program and Evaluation Experience
   Do ... on tobacco control issues in Ca ... s, regulation and community

   C

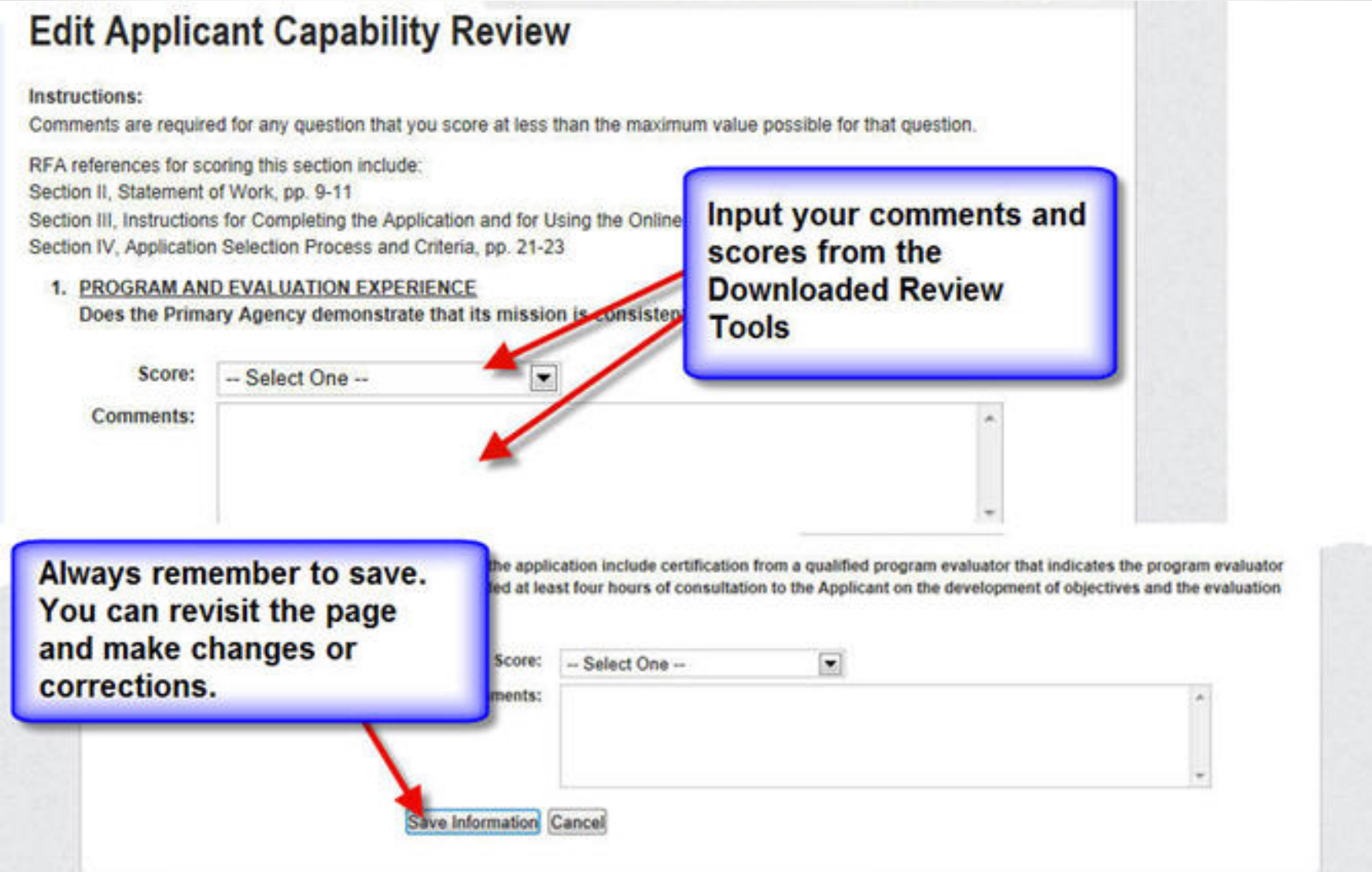
2. Do ... e consistent with the goals of thi ... ons that the agency typically wo ... e with diverse partners such as ... icials, local decision makers, sch ... al organizations, and community based organizations?

   Score: Somewhat Demonstrated (3 pts)

   Comments: ---

3. Does the Applicant demonstrate the ability to educate the local California public health community and groups

How you start or go through the Review process is up to you. For this example we will click on "Applicant Capability."



Remember to Reference the RFA guidelines in TCFOR as indicated for each Review section.

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Reports

Budget and Budget Justification

Edit Budget and Budget Justification Review

RFA references for scoring this section include:
Section II, Applic
Section III, Instr
pp. 14-15
Section IV, App

o Information System (OTIS),

1. Were the

ned for each fiscal year?

2. Are the bud

able and reasonable when compared to the description of the SOW activities?

Score: Highly Demonstrated (15 pts)

Comments: ---

Budget and Budget Justification Total Score: 16 (Possible Points: 0 to 20)

Once you have completed all your review comment and score entries. Click on "Scoresheet."

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Peer Review Scoresheet

Edit Recommended Funding and Overall Comments

Applicant: Test Agency Number 2

Project Name: Test Procurement Build

Funding Requested: $ 0

Recommended Funding: --

Scoring :

Scoring	Possible Points	Awarded Points
Applicant Capability	0 to 39	19
Scope of Work: Intervention Activity Plan	0 to 21	17
[illegible]	[illegible]	0
[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	6
[illegible]	[illegible]	[illegible]

Pass/Fail: F

Overall Application Strengths: ---

Overall Application Weaknesses: ---

Click on "Edit Recommended Funding and Overall Comments"

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Edit Recommended Funding and Overall Comments

Applicant: Test Agency Number 2

Project Name: Test Procurement Build

Funding Requested: $ 0

Recommended Funding : $

Scoring:

Section	Possible Points	Awarded Points
Applicant Capability	0-39	19
Scope of Work: Intervention Activity Plan	0-21	17
Scope of Work: Evaluation Plan	0-10	10
Narrative Summary	0-10	4
Budget and Budget Justification	0-20	16
TOTAL:	0-100	66

il: FAIL

on

s:

Over Application

aknesses:

Save Information Cancel

Tool

ity

tervention

Enter a "Recommended Funding amout, Overall Application Strenghts, Overall Application Weaknesse and Save Information."

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Online Tobacco Information System

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Application Review Submission

Applicant: Test Agency Number 2
Project Name: Test Procurement Build

Your review is NOT ready for submission.

The following section(s) of your Review have unscored questions which must be scored before submitting:

- Narrative Summary

The following section(s) of your Review have questions which have been scored at less then the maximum value and which have had no comments provided:

- Applicant Capability
- Scope of Work: Intervention Activity Plan
- Narrative Summary
- Budget and Budget Justification

The following fields on the Scoresheet have not been given values:

- Recommended Funding
- Overall Application Strengths
- Overall Application Weaknesses

While working through the review process you can check the Review Submission to monitor your status.

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Application Review Submission

Applicant: Test Agency Number 2
Project Name: Not Provided

Your review is ready for submission.

Submit Application Review

After completing all sections of the Peer Review in accordance to the RFA guidelines you will see "Your review is ready for Submission." However keep in mind that once you click on the "Submit Application Review" Button; you will not be able to go back and make any modifications to comments or scores if needed.

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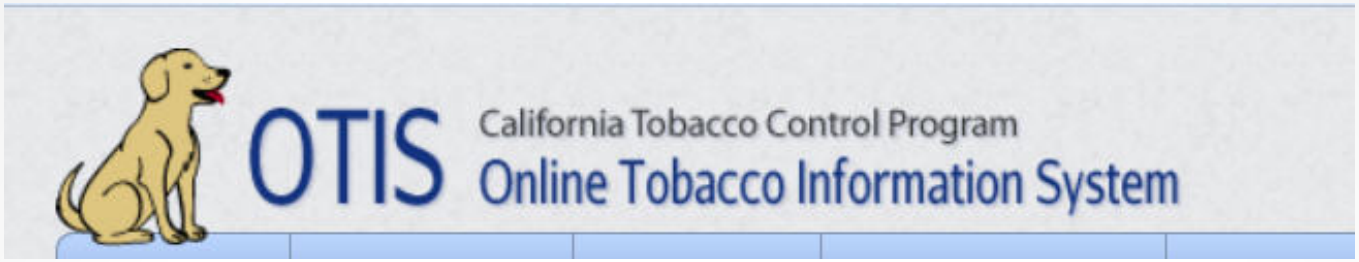

The following slides are examples/options on other methods in accomplishing a “Peer Review” Process.

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IE

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CG 14-10

Edit Applicant Capability Re iew

Instructions:
Comments are required for any question that you score at han

RFA references for scoring this section include:
Section II, Statement of Work, pp. 9-11
Section III, Instructions for Completing the Application and for
Section IV, Application Selection Process and Criteria, pp. 21-2

1. PROGRAM AND EVALUATION EXPERIENCE
Does the Primary Agency demonstrate that its mission

Score: -- Select One --

Comments:

2. Does the Applicant demonstrate its
education, safe communities, hous
education, youth development and

Score: -- Select One --

Comments:

OTIS - Online Tobacco Information System - Mozilla Firefox

https://otis.catcp.org/index.cfm?fuseaction=reports.planReportWeb&p_useVersionID=40488&p_circuit=appCap&p_fuseaction

FireFox

Applicant Capability

Procurement Name: CG 14-10010 Reduce Tob -Related Inequities Interventions	
Contract Number:	**Contract Term:** 07/01/2014 - 06/30/2016
Agency Name: Test Agency Number 2	**Effective Date:** 07/01/2014
Project Name: Test Procurement Build	**Plan Version ID:** 0.1
Project Type: CG: General	**Report Generated:** 01/06/2014 01:51 PM

PROGRAM EXPERIENCE

1 **Agency Mission: Briefly how the Applicant's general mission is consistent with th RFA.**

No Answer Provided

2 **Demonstrated Link ibe ways the Applicant's has or is able to creatively link toba secondhand smok o other community concerns such as education, safe comm prevention, empl childhood development and education, youth development**

of reach, influence, and credibility
y members and leaders. Please di
d, and response from the communi

ining, and demonstrate at least tw
(if applicable): planning, implement

No Answer Provided

5 **Demonstrated Results: Describe a minimum of two years of experience creating tangible a in the Applicant's community such as developing a voluntary or legislated policy, establishi**

Option 2:
Open two sparate browsers IE 9, 10, or 11 and Firefox and input comments and scores.

Print | Close Window

Applicant Capability

Procurement Name: CG 14-10010 Reduce Tobacco-Related Inequities Interventions	
Contract Number:	**Contract Term:** 07/01/2014 - 06/30/2016
Agency Name: Test Agency Number 2	**Effective Date:** 07/01/2014
Project Name: Test Procurement Build	**Plan Version ID:** 0.1
Project Type: CG: General	**Report Generated:** 01/06/2014 01:51 PM

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Click on "Add Review Note"

PROGRAM EXPERIENCE

1 **Agency Mission: Briefly describe how the Applicant's general mission is consistent with the goals RFA.**

No Answer Provided

2 **Demonstrated Linkages: Describe ways the Applicant's has or is able to creatively link tobacco us smoke exposure to other community concerns such as education, safe communities, employment, early childhood development and education, youth development and lea**

vided

d Access: Describe a minimum of two years of reach, influence, and credibility with o RFA identified communities of focus including community members and leaders. Please discuss h established relationships, activities that were conducted, and response from the community(ies).

No Answer Provided

4 **Program Staffing: Describe the formal education and training, and demonstrate at least two years of professional experience, of the Applicant's staff and subcontractors (if applicable): planning, implementing and evaluating community-based programs.**

No Answer Provided

5 **Demonstrated Results: Describe a minimum of two years of experience creating tangible and meaningful change in the Applicant's community such as developing a voluntary or legislated policy, establishing a farmers' market, increasing voter registration, etc.**

OTIS - Online Tobacco Information System - Windo...

https://otis.catcp.org/index.cfm?fuseaction=peerReview.noteA

Print | Close Window

Add Application Review Notes

Instructions on How to Use the Application Notes

Application Section:

--- Applicant Capability

Note: (If Note field is left blank, nothing will be saved.)

Q.1. Add your Comments
Score: Add your Score

Save Information | Cancel

Instructions on How to Use the Application Notes

Entering Notes:

1. Select a specific section of the application/plan to comment upon from the menu.
2. Enter your comment into the text box and click on "Save Information."

Option 3: Click on the "Add Review Note" Open the "Applicant Capability" Report Select "Applicant Capability" in the Application Section in the "Add Review Note" tool. Enter your comments and score for each criteria of the "Download Review Tool" and save information. [Go to next]

OTIS California Tobacco Control Program Online Tobacco Information System

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Application

Peer Review

- Download Review Tool
- Applicant Capability
- Scope of Work
- Evaluation Plan
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- Budget Justification
- Scoresheet
- Review Submission
- Add Review Note
- View Review Notes

Reports

Edit Applicant Capability Review

Instructions:
Comments are required for any question that you score at less than the maxin

RFA references for scoring this section include:
Section II, Statement of Work, pp. 9-11
Section III, Instructions for Completing the Application and for Using the Onlin
Section IV, Application Selection Process and Criteria, pp. 21-23

1. PROGRAM AND EVALUATION EXPERIENCE
   Does the Primary Agency demonstrate that its mission is consister

Score: -- Select One --

Comments:

2. **Does the Applicant demonstrate its ability to creatively link tobacc education, safe communities, housing, alcohol prevention, employ education, youth development and leadership, etc.)?**

Score: -- Select One --

of

work?

Score: -- Select One --

https://otis.catcp.org/index.cfm?fuseaction=peerReview.noteVi

Print | Close Window

View Application Review Notes

Add Note | Print Window | Close Window

View By: *Date Saved* | Application Section

Background Information -- Applicant Capability
(01-06-2014 -- 03:11 PM)
Q.1. Add your Comments Score: Add your Score

Background Information -- Applicant Capability
(01-06-2014 -- 03:11 PM)
Q2. text text text text text

Print | Close Window

Next click on "View Review Notes" copy and paste your comments and scores to the appropriate comment box and save the information.

Make sure you follow the guidelines set in TCFOR for the RFA. If you experience any errors or navigational problems with OTIS contact Humberto Jurado @ Humberto.jurado@cdph.ca.gov or call 916-449-5474.