California Tobacco Control Program
CTCP Request for Proposal
14-10313

June 27, 2014

Presenters:

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Chief, Evaluation Unit

Robert Thurman

Procurement Manager

Humberto Jurado,

Technology Projects Analyst

Meeting Agenda

1. Welcome and introductions
2. General reminders
3. RFP overview
4. Questions

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GENERAL REMINDERS

- ✓ The informational webinar is being recorded.
- ✓ Your phones will be muted during the presentation.

Thank you!

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GENERAL REMINDERS

- The RFP instructions at the Tobacco Control Funding Opportunities and Resources (TCFOR) website http://tcfor.catcp.org take precedence over anything said during this presentation.
- Interested proposers are to refer to the RFP instructions for clarification on any criteria or requirements.
- Technical assistance to RFP scored components will not be provided.
- CTCP will post any necessary RFP updates, corrections or modifications on the TCFOR website.
- We encourage interested proposers to frequently access the TCFOR website for announcements, updates, corrections or modifications to the RFP.

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GENERAL REMINDERS

- The RFP requires proposers to submit proposal components via the CTCP Online Tobacco Information System (OTIS).
- Proposers shall submit proposals according to RFP instructions and information in Appendix 8: Instructions for Accessing the OTIS Training Course.
- Do not wait until the last minute to submit your OTIS application! Technical difficulties will not excuse a late submittal.

- Webinar materials will be posted on the TCFOR website.

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GENERAL REMINDERS

- The information webinar will end when questions are answered, which may be prior to the scheduled meeting end.
- During the meeting questions may be submitted in the webinar "chat-box". A short break will follow the presentation to allow CTCP time to review questions from the meeting.
- Questions will be read and answered by CTCP staff during the question period.
- June 27th is the deadline for all questions. All questions and answers will be posted at the TCFOR website July 1, 2014.

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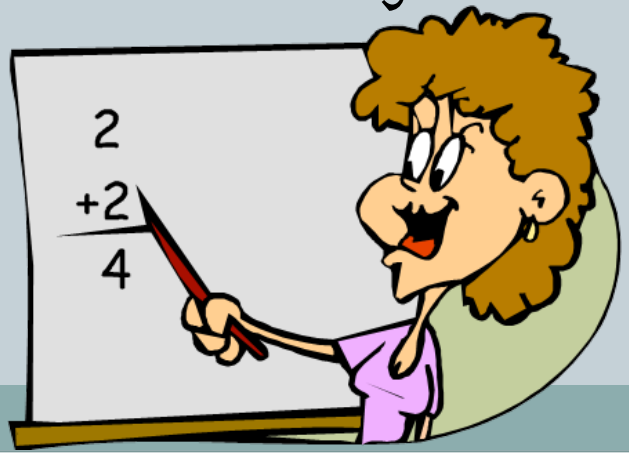
RFP overview:

- Purpose
- To select one qualified Contractor with highly skilled research professionals to develop and manage survey tools, educate data collectors and conduct data analyses.



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RFP overview:

- Goal:
  - The goal of the procurement is to identify the contractor most capable of providing survey development, implementation, and analyses for two retail surveys:

1. The California Tobacco Retail Surveillance Study (CTRSS);
2. The Healthy Stores for a Healthy Community (HSHC) evaluation survey.

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RFP overview:

- Contract Term –
  - January 1, 2015 to December 31, 2017
- Funding –
  - Up to $1,050,000 for 36 months
- Mandatory Letter of Intent – Due to CTCP via email
  - Due July 11, 2014 @ 5 p.m. Pacific Time
- RFP due –
  - July 25, 2014 @ 5 p.m. PT
- Submit the Proposal –
  - Online Tobacco Information System (OTIS)
- Notice of the Intent to Award –
  - August 1, 2014

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Request for Proposal TIMELINE

First Day to Request to Apply	June 27, 2014
OTIS Open	June 27, 2014
RFP Informational Webinar	June 27, 2014, 10 A.M. – noon, Pacific Time
Mandatory Letter of Intent Deadline	July 11, 2014, 5 P.M. Pacific Time
Last Day to Request to Apply	July 23, 2014
Proposal Deadline	July 25, 2014, 5 P.M. Pacific Time
Notice of Intent to Award	August 1, 2014
Dispute Deadline	August 8, 2014, 5 P.M. Pacific Time
Dispute Hearings	August 13, 2014
Dispute Decision(s) Announced	August 15, 2014
Proposed Award Date	August 18, 2014
Negotiation Period	August 19 – 29, 2014
Agreement Start Date	January 1, 2015 (tentative)
Agreement End Date	December 31, 2017

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Registration Instructions:

- To submit a "Registration" form, mandatory letter of intent and create an OTIS "User Account" see the Proposal Registration Instructions found on the Tobacco Control Funding Opportunities (TCFOR) web site, accessible at https://tcfor.catcp.org/index.cfm?fuseaction=opportunities.overview.

Additional Instructions:

- Instructions for requesting an OTIS "User Account" are also found in Appendix 7 TCFOR User Instructions. OTIS includes an Applicant Training Course: Creating Your Proposal/Plan. This training provides an orientation to get started and instructions for inputting the contact information and budget justification. See Appendix 8 Accessing the OTIS Applicant Training Course. Proposers will upload the scope of work, capability information and letters of reference into the Other Documents which is accessed at the OTIS Additional Documents section.

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Responses to this RFP shall be submitted through the CTCP Online Tobacco Information System (OTIS).

- OTIS is a secure, password protected communication system that is used to submit proposals and applications. The system is accessible 24 hours per day, 7 days per week and provides secure access.

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- Scoring Criteria
  - Agency Capability – 40 Points
    - Work History and Competency
    - Program Staffing
    - Demonstrated Performance
    - Flexibility and Responsiveness
    - Letters of Reference
  - Scope of Work – 40 Points
  - Budget & Budget Justification – 20 Points

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- Agency Capability
  - Work History and Competency:
    - Briefly describe the proposer's work in developing survey instruments, data collection; including educating data collectors, evaluation and analysis, dissemination of information and publishing results related to Tobacco control retail advertising or a closely related Public Health activity.
    - Describe the types of programs and services conducted and audiences/groups the proposer works with to carry-out surveys and evaluations.
    - Describe the public health work of principle staff and provide information about work performed on a statewide basis.
    - Provide a brief summary of the proposer's audit history for the previous three years.

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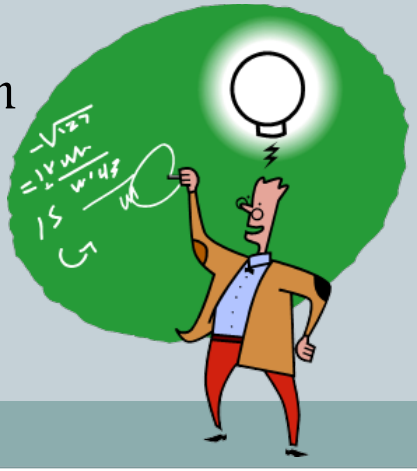
- Agency Capability (Cont'd)
  - Program Staffing
    - Describe the professional experience, formal education and qualifications of principle personnel that will staff the project.
    - Emphasize skills and qualification related to the CTRES Minimum Required Scope of Work Elements in Appendix 1.
    - Describe expertise in survey tool development, study design, data cleaning and data analysis.
    - Describe experience with Geographic Information Systems (GIS) and spatial analysis.



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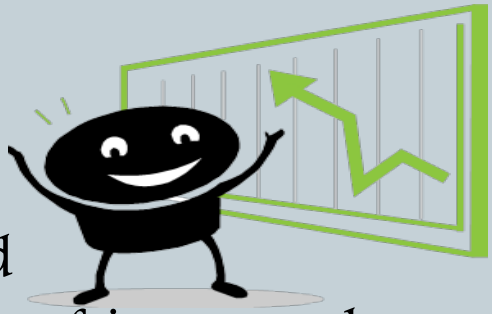
- Agency Capability (Cont'd):
- Program Staffing (Cont'd)
  - Demonstrate that staff and any recommended subcontractors* have the necessary knowledge of issues and trends regarding tobacco product advertising and marketing in retail stores.
  - Knowledge of relevant tobacco control laws in California is highly desirable.
  - Staff experience designing and implementing studies of the California tobacco retail environment is also highly valued.



*Note: Subcontracting will be limited to temporary or occasional services during the term of the contract.

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- Agency Capability (Cont'd)
  - Demonstrated Performance
    - Briefly describe at least two specific examples of projects the proposer has worked on that are similar in nature to the CTRES Minimum Required SOW Elements (Appendix 1).
  - Flexibility and Responsiveness
    - Briefly describe the proposer's ability to anticipate and adapt to any emerging issues that relate to the CTRES Minimum Required SOW Elements (Appendix 1).

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- Agency Capability (Cont'd)
  - Letters of Reference
  - Upload two letters of reference into OTIS Additional Documents. Letters of reference must be written to the proposer within the last 2 years.

  - If the Proposer is currently receiving, or within the last two years received funding from a local, state, or federal agency other than CTCP, one of the letters **must be** from that reference.

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- Scope of Work–
  - Provide a scope of work that demonstrates how the Proposer's research team would implement the CTRES Minimum Required SOW Elements (Appendix 1).
  - Explain how the Proposer's research team would plan and execute the California Tobacco Retail Environment Studies in a cost-effective and timely manner.
  - Include a timeline that provides details on how the Proposer's research team will implement these projects; including, development of the survey tools and protocols, educating data collectors, analyzing data and interpreting results.

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- Budget Justification –

  The project expenses must be proposed using an eight (8) category OTIS budget.

  a)Adhere to the instructions and criteria provided in the RFP and Appendix 5, Budget Justification Instructions. Note: The OTIS training course contains a budget module that explains how to input your budget justification into OTIS; including a help item called "OTIS Wizards".

  b)Develop a 36 month budget associated with the implementation of the scope of work that is accurate, reasonable and supportable when compared to the activities detailed for each fiscal year.

  c)Provide sufficient budget category information that is easy to follow and clearly connects to activities in the scope of work.

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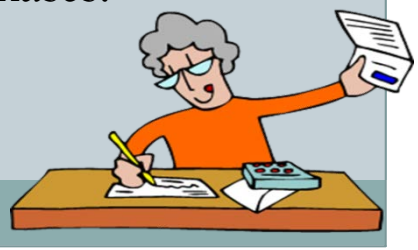
d)Provide personnel costs that reflect salaries comparable to State Civil Service classification rates (associated duties must also be comparable). Salaries that are above comparable State Civil Service classification rates must be fully justified. (See Appendix 4)

e)Designate personnel FTE percentages that are reasonable and based on the effort amounts assigned to the responsible parties in the scope of work.

f)Provide a list of Fringe Benefits for personnel and fully describe each benefit.

g)Provide a justification for any Equipment budgeted to complete scope of work implementation, including how the costs represent a good investment of public funds. Ensure conformance with CDPH equipment purchases. (See Appendix 3)



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h) Provide a narrative and expense detail for any Subcontractor/Consultant costs necessary to implement scope of work activities. Clearly distinguish the responsibilities for each temporary Subcontractor/Consultant from budgeted personnel and connect the position(s) to activities in the scope of work for the limited term.

i)Budget travel costs necessary to implement the scope of work and indicate applicable activities.

j)Budget Other Costs that are required to implement the scope of work. Include per unit costs and quantities, where applicable. Ensure conformance with CDPH policies on materials and other purchases. (See Appendix 5)

k)Budget Indirect Expenses not to exceed 25% based on total personnel costs (Salary plus fringe benefits total). List and briefly explain the expenditure for each indirect expense.

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RFP overview:

- Summary of documents to upload in OTIS.
- Additional Documents
  - Certification of Non-Acceptance of Tobacco Funds
- Additional Documents/Other Documents
  - Applicant Capability
  - Scope of Work
  - Letters of Reference

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RFP overview:

- Contract –

  Draft contract language may be viewed at the TCFOR website. Should the successful proposer be unable to adhere to the contract terms and conditions or negotiate the contract within a reasonable time; CDPH/CTCP reserves the right to withdraw the award and may elect to negotiate a contract with another high scoring proposer.

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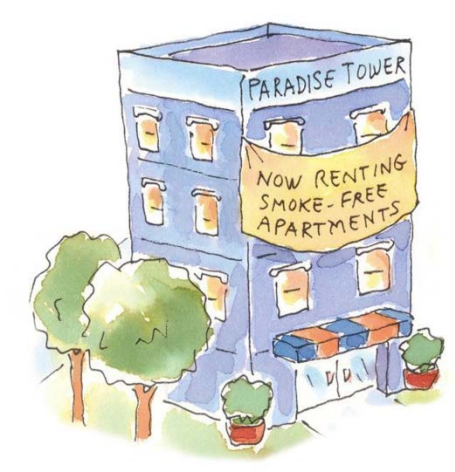
- Continue to check for updates at:

Tobacco Control Funding Opportunities and Resources website:

- https://tcfor.catcp.org/



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After questions we will take a short break ..... then return to answer meeting questions.

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