Residential Retrofit Bidders Conference

RFP II - 9/24/2024

Please add your name, organization, and favorite Fall "flavored" food to the chat!

Please keep yourself on mute until the Q&A.

This meeting will be recorded and posted on the solicitation page.

MASSACHUSETTS TECHNOLOGY COLLABORATIVE

OUR MISSION: We strengthen the competitiveness of the tech and innovation economy by driving strategic investments, partnerships, and insights that harness the talent of Massachusetts.

THE INNOVATION INSTITUTE

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NEMC Northeast Microelectronics Coalition **HUB**

Administering ~$530M in state and federal funds over the next 2 fiscal years.

Established in 1982 by Legislative Statute

MBI MASSACHUSETTS BROADBAND INSTITUTE at the MassTech Collaborative

Agenda

01 | Program Overview and Round I Outcomes

02 | RFP Requirements, Application Process, and Scoring

03 | Project Groups

04 | Post Application Submission Process

05 | Grant Agreement Terms and Conditions

06 | Questions and Answers Session

Residential Retrofit Program

Funding Source and Parameters:

- $22M Grant Program
- No match requirement
- US Treasury ARPA Capital Projects Fund
- Quarterly RFP's until funds are expended
- Projects must be substantially completed by 12/31/2026

Grants will be made directly to ISP's & MSP's to:

- Build fiber infrastructure into affordable housing buildings;
- Install fiber or CAT 6 cabling into units within affordable housing buildings – **service capability minimum 100/100**;
- Install smart panels or other needed in unit termination points for improved wiring within affordable housing buildings; and
- Other required cabling, RF, or telecommunications equipment as required by conditions within participating properties.

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Residential Retrofit Program

Program Objectives

1. Improve quality of service via infrastructure investment.

2. Leverage grant funds as an operational subsidy to decrease service costs for residents.

3. Incentivize innovative solutions such as bulk service and open access networks.

4. Encourage collaboration with workforce providers to build industry partnerships.

Residential Retrofit Program

100% Grant Funded Program – No Match Required

Does Not Supplant Any Existing Infrastructure

Residential Retrofit RFP I Overview

- **Average cost to build / unit - ~$2,100**

- **Retail Cost / Unit: ~$15 - $30 / unit / month – at least 100/20**

- **Bulk Cost / Unit: ~$10 - $25 / unit / month – at least 100/100**

- **Applicants provided a range of community benefits to increase points:**

– free wi-fi in common areas, devices for residents, digital skills training classes, workforce partnerships, open access network options and use of public infrastructure.

3,382 units of Public and Affordable Housing supported under RD I

RFP II Housing Partners

- Adams Housing Authority
- Hearthway
- Pittsfield Housing Authority
- The Caleb Group
- Preservation of Affordable Housing
- Carr Properties
- First Hartford Realty Corporation
- Holyoke Housing Authority
- Leicester Housing Authority
- Norton Housing Authority
- Redwood Housing
- Related Affordable
- Trinity Financial, Inc.
- Worcester Common Ground
- Worcester Housing Authority
- Quincy Housing Authority

The Round II RFP represents 88 developments and 8,538 units.

Future RFP's will solicit new sites.

RFP II Timeline

Activity	Date
RFP Issued	September 16, 2024
Bidders Conference	September 24, 2024
Questions Due	October 4, 2024
Questions Posted	October 11, 2024
Technical Assistance Session	October 16, 2024
RFP Closes	October 30, 2024
Final Applicants Notified	November 13, 2024
Site Visits	November 18 – December 6, 2024
Final Applicants Deadline for Resubmission of Application Materials	7 business days from Site Visit
RFP Awards Made	January 2025
*All RFP schedule descriptions and dates are tentative and subject to change.	

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RFP Requirements, Application Process, & Scoring

RFP Sections

Threshold Requirements

Section 7.1 of RFP

Scored Criteria

Section 7.2 of RFP

Bonus Points

Section 7.3 of RFP

- Network Design
- Customer Premise Equipment
- Project Schedule
- Fiber Reservation of Rights
- Service Level Agreement
- Affordability
- Agreement with Property Owners

- Service Subscription Costs
- Proposed Project Costs
- Experience implementing Similar Projects.
- Community Benefits
- Organizational Capacity and Resources
- Labor and Workforce Standards
- Financial Capability

- Use of Public Broadband Infrastructure.
- Open Access Network
- Bulk Service

MBI recommends reviewing and becoming familiar with the RFP prior to beginning the online application!

Application Tips for Success

1. If there are elements of your application you wish MTC to maintain as confidential and exempt from public records requests, please refer to section 6.1.2 of the RFP for direction on making a request to MTC General Counsel Jennifer Saubermann.

2. All content and materials requested as Threshold Requirements MUST be submitted. TBD is not an acceptable response and will warrant a disqualification under the RFP.

3. An officer certification of compliance with local and federal laws MUST be submitted in ALL applications. An example letter is available on the procurement website. **This is in ADDITION to the signed letter from the CEO or CFO accompanying unaudited financials.**

4. To gain community benefits points please address the specific requirements described in the community benefits section. Describing general corporate activities related to community benefits will not warrant points allocated.

5. When submitting example projects be sure to describe how the example projects meet the requirements outlined in the RFP and are contextually relevant to the Project Group.

6. Review the sample contract posted on the solicitation website – eligible expenses are further outlined.

Online Application

The Application is structured around four main sections:

1. General Applicant Information
2. Standard Business Practices
3. Project Group Information Scored Criteria
4. Project Group Information Bonus Points Criteria

Applicants will only need to provide General Applicant and Standard Business Practices Information once.

After completing the General Applicant and Standard Business Practices Information sections, the applicant will select which of the **Project Groups** they are interested in providing improved broadband service to under this grant program. They will then provide specific information for each Project Group they have selected as Scored and Bonus criteria.

**All RFP responses must be submitted through
the online application portal!**

Project Group Application Process

Project Group Selection

You will now have the opportunity to select which project groups you are interested in serving under the Retrofit program. Project Group details and summary information can be found on the Retrofit solicitation website. For each project group you select, there will be a series of questions you are required to answer. You will have the ability to review your answers for each project group before moving to the next and click back to any previous project group using the back button at anytime.

Please select the Project Groups you are interested in serving:

- [ ] Boston Housing Authority: Peabody/Englewood, Torre Unidad, Washington Manor
- [ ] Boston Housing Authority: Hassan Apartments, MLK Towers, Codman (2 units are offices)
- [ ] Adams Housing Authority: Columbia Valley
- [ ] Preservation of Affordable Housing (POAH): Temple Landing
- [ ] Preservation of Affordable Housing (POAH): Bay Meadow Apartments
- [ ] Pittsfield Housing Authority: Christopher Arms, Providence Court, Francis Plaza, Columbia Arms
- [ ] Pittsfield Housing Authority: ROSE MANOR
- [ ] Norwood Housing Authority: Willowood
- [ ] Codman Square NDC: 157 Washington, Whittier Place
- [ ] Bethany Community Services, Inc.: Mission Towers
- [ ] The Schochet Company: Weldon, T
- [ ] Carr Properties: Seniority House, Highland House, Independence House South, Costello House
- [ ] Deacon Properties: Bay State Apartments
- [ ] Caleb Group: Mohawk Forest
- [ ] Caleb Group: The Sirk Building
- [ ] Berkshire Housing : Cherry St., George St., Epworth Arms Apartments, Capitol Square APTS
- [ ] Berkshire Housing : Clark Biscuit Apartments LLC
- [ ] Berkshire Housing : Pittsfield April Lane LLC
- [ ] Berkshire Housing : Barrett House Apartments

Applicants can select one or more Project Group from this list.

These project groups correspond to the data in the online AirTable databse.

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Project Group Application Process: RFP II UPDATE

Click here to apply this response to all other project groups ☐

Applicants will have the ability to apply a response within the project group section to all other project groups.

Use this feature ONLY if you plan to submit a standard response for the question across ALL other project groups.

Example: If your organization is only applying for townhouse style developments of similar structure and scale you may choose to apply your response for example projects across all project groups to expedite the application process.

Evaluation Criteria Scoring

RFP Section	Scoring Criteria	Points will be awarded up to:
7.2.1	Service that will still be low cost or free without subsidy	20
7.2.2	Proposed Project Costs	20
7.2.3	Experience in implementing projects of similar size and complexity	16
7.2.4	Community benefits	12
7.2.5	Organizational capacity and resources	12
7.2.6	Labor and workforce standards	10
7.2.7	Financial capability	10
TOTAL POINTS		**100**

Applicants must meet a minimum score of 50 to be eligible for a grant, as outlined in section 7.2 of the RFP

Add'tl Scoring Details

Affordability of Service w/out Subsidy
- MBI is targeting $10 month price point for 100/20 service **(18 pts).**

Community Benefits
- MBI is encouraging applicants to provide any of the following community benefits: Free WiFi in public spaces (hallways, community rooms, lobbies, outdoor areas, etc), devices at a ratio of 1:4 units, and digital skills courses. **(4 pts for any of the above)**

Workforce and Labor
- MBI seeks to foster partnerships between applicants and workforce training provider via demonstrated commitments to support recruitment/training activities in any sector relevant to the Residential Retrofit Program (low voltage cabling, fiber construction, network design/management, IT support, or other relevant sector). **(4 pts)**

Evaluation Criteria Scoring

Evaluation Criteria		Maximum Scoring
7.3	Optional Bonus Criteria	25 pts
	#1 – Leveraging Public Broadband Infrastructure	5 pts
	#2 – Open Access	10 pts
	#3 – Bulk Service	10 pts

Bonus criteria does not count towards the 50 point scoring minimum requirement.

Add'tl Bonus Scoring Details

Leveraging Public Broadband Infrastructure
- Applicants that commit to using backhaul or ISP service offered over a publicly owned network will receive **5 points.**

Open Access Infrastructure
- Applicants may propose open-access arrangements ranging from provision lit fiber services for other ISPs, to installation of second pathways or shared conduits to Properties that allow other ISPs to provide their own service (or other arrangements that would lower barriers to entry for serving Properties by other ISPs). **(Up to 10 Pts)**

Bulk or Enterprise Service Options (Up to 10 Pts)
- If the Applicant chooses to propose a bulk service option they must:
    - (1) guarantee service levels of at least 100/20 to each unit;
    - (2) be able to provide individual units an opportunity to upgrade their service levels on a unit-by-unit basis; and
    - (3) propose backhaul service in alignment with the applicants proposed oversubscription ratio as outlined in the response to section 7.1.1.

Eligible Applicants

Lead Applicants

Internet Service Providers (ISPs)

- Entities currently providing internet services to consumers in Massachusetts and potential new market entrants. This may include entities that are not legacy providers of cable television or telephone services but who are interested in offering retail internet service over newly built infrastructure.

Managed Service Providers (MSPs)

- Entities operating networks and providing service to residents and businesses by leveraging existing internet infrastructure or partnering with other entities to build networks.

Potential Partners

Owners of Broadband Infrastructure

- Entities currently operating or holding fiber infrastructure in Massachusetts and potential new market entrants who own middle- or last-mile fiber infrastructure.

Builders of Broadband Infrastructure

- Entities who construct and/or deploy broadband infrastructure assets including fiber, low voltage cabling, and other relevant RF or telecommunications equipment.

Other

- Entities supporting the deployment of broadband infrastructure under the Residential Retrofit Program.

Grantee Requirements

- Own all assets funded by the Program (subject to the Federal Interest period through 12/31/2034)

- Allow MBI to retain rights to use three fiber strands for all fiber service constructed under this grant program. MBI will require that this will include accessible service coils at ingress/egress points of any fiber extension and drop to any Property funded under this program.

- Commit to not imposing data caps, surcharges, or usage-based throttling of residents of participating properties.

- Commit to participating in any future federal or state subsidy program similar to the Affordable Connectivity Program.

- Commit to not raise service prices as submitted in the Application by more than 3% in any year over year timeframe throughout the Federal Interest Period (i.e., through 2034).

Grantee Requirements Cont.

- Grantees will be responsible for the procurement and installation of all materials, equipment, wiring and any other capital assets and ancillary services required to implement the awarded projects.

- Grantees will be responsible for submitting a draft agreement that they propose be signed by the Property Owner(s) that indicates the proposed service level(s) and price(s) along with building access requirements.

Eligibility

Eligible Costs

- Installation of fiber construction into affordable housing buildings. Up to ½ mile of last mile construction.

- Installation of fiber or CAT 6 cabling into units within affordable housing buildings

- Installation of smart panels or other needed in unit termination points for improved wiring within affordable housing buildings

- Other required cabling, RF, or telecommunications equipment as required by individual building conditions within affordable housing buildings.

Ineligible Costs

- Acquisition of spectrum licenses;

- Operating expenses, other than grant administration costs;

- Short-term operating leases;

- Payment of interest or principal on outstanding debt instruments, or other debt service costs incurred prior to March 15, 2021

- Fees or issuance costs associated with the issuance of new debt;

- Satisfaction of any obligation arising under or pursuant to a settlement agreement, judgment, consent decree, or judicially confirmed debt restructuring plan in a judicial, administrative, or regulatory proceeding; or

- To support or oppose collective bargaining. This does not affect the ability to use funds to comply with 41 C.F.R. 60-1.4.

Click here for additional specific details of eligible and ineligible uses of funds – as defined by U.S. Treasury.

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Project Groups

MBI has received submissions for over 450 developments representing over 25,000 units across the state.

Housing Site Eligibility

- State and federally funded public housing developments.

- Developments supported by Low Income Housing Tax Credits or other deed-restricted affordable housing developments.

- Housing developments that serve residents that fall at or below 300% of Federal Poverty Guidelines for household size or income at or below 65% of Annual Median Income.

- Mixed income affordable housing developments will only be eligible if they are located in "Qualified Census Tracts" (QCTs).

- MBI will not invest in properties where less than 50% of the units are deed restricted affordable unless the property owner can provide sufficient information regarding the long-term affordability of the property and that residents meet US Treasury definitions of "Impacted" or "Disproportionately Impacted".

- MBI will not invest in properties where internal wiring upgrades have been made in the past five years or if there is fiber connectivity to the building and unit, or CAT 6 ethernet cabling to the unit.

Project Groups

Eligible housing sites have been consolidated into *Project Groups* of not more than five developments under common ownership. Any given development can consist of one or more buildings.

Project Group Summary

Housing Operator: Coalition for a Better Acre
Website: coalitionforabetteracre.org
Total Units: 60
Total Buildings: 3
Town: Lowell
Notes: CBA has recently, in partnership with UMass Lowell, been offering community members computer literacy classes. Participants additionally are able to keep the devices after completing the class. Pairing this initiative with this program would be ideal for residents.
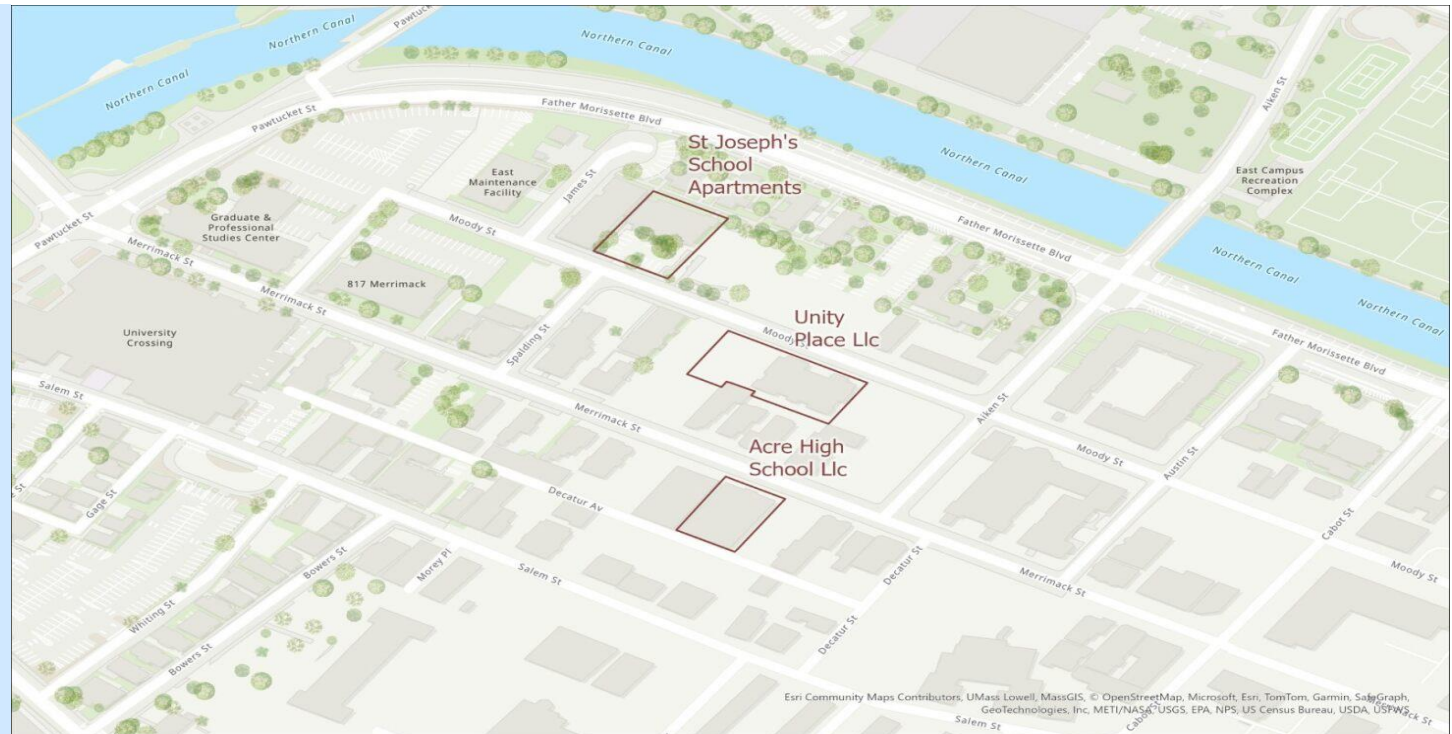
Project Groups

Project Group Summary data can be found **online here**.

Detailed development information can be found **online here**.

- Development Name
- Address
- City/Town
- Zip
- Latitude
- Longitude
- External Construction Material
- Interior Construction Materials
- Commercial Fiber Providers w/in 2000 Ft
- # of units by bedroom
- Total Units
- Stories
- Total Buildings
- Year Built
- Year Renovated
- Known asbestos in building
- Interior non-residential/public space

- Context Map

Project Groups

Data can also be downloaded from the online AirTable.

04

Post Submission Process

Post Submission

1. Applications that meet Threshold Criteria are reviewed for scored and bonus criteria.

2. The top three scoring applicants for each Project Group will be invited to a site visit with the housing operator.

   - MBI will provide the applicants with three potential date/time options for a site visit.
   - Applicants must respond to MBI within 2 business days regarding their preference.
   - The date/time that is most preferable between the three applicants will be selected.

3. Applicants will be allowed to resubmit components of their original application based on additional information gleaned during the site visit within 7 days of the site visit.

4. MBI will then rescore any materials resubmitted by applicants.

5. The top scoring applicant will be awarded the Project Group.

Change Orders

MBI will allow applicants to submit change orders and cost adjustments after award, but only for items that would have been unforeseeable at the time of the application.

MBI intends to use the site visit process to minimize change orders and ensure reasonable cost submissions at the time of application.

MBI encourages applicants to thoroughly review their cost estimates and assumptions prior to submission to minimize the amount of change orders required upon award.

Change orders will be evaluated on a case-by-case basis and will be awarded at the sole discretion of MBI.

05

Grant Agreement Terms and Conditions

Grant Terms and Conditions

- The Funding Agreement will include terms and conditions including, but not limited to:

  - Description of the services

  - Roles and responsibilities

  - Grant payment schedule (payment on a reimbursement basis upon completion of milestones)

  - Eligible uses of funds

  - Period of performance

  - Accounting and reporting requirements

  - Compliance requirements

  - Remedies for noncompliance

  - Audit practices

  - Recording keeping

  - Internal controls, and

  - Other terms required by federal law

Documentation Disclaimer

- All responses, applications, data, materials, information, and documentation submitted in response to the Residential Retrofit Program shall become MBI's property and shall be subject to public disclosure.

- MassTech/MBI is public entity and is subject to the Massachusetts Public Records Law. Every document submitted to MassTech/MBI is a public record unless an exemption applies.

- If an Applicant wishes to have MassTech treat certain information or documentation as confidential, the Applicant must submit a written request to MassTech's General Counsel prior to submission to MassTech/MBI. The details for this process are in Section 6.1.2 of the grant solicitation.

06

Questions and Answers Session

Massachusetts Digital Inclusion Event – October 9th

Celebrating Digital Equity in Massachusetts: A Forum for Innovation and Collaboration

Worcester, MA | Venue: TBA

- **Who:** Digital Equity & Inclusion Practitioners
- **What:** One-Day Celebratory & Networking Event
- **When:** Wednesday, October 9th (9am-3pm)

https://broadband.masstech.org/digital-inclusion-week
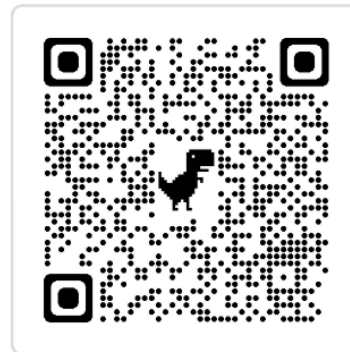
Program Includes: Keynote Speakers, Awards Ceremony, Panel, & Networking!