

**Methow Valley Broadband Action Team (BAT) Planning
Request for Proposal (RFP)**

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1. Overview

Methow Valley, Okanogan County and the Colville Confederated Tribes Broadband Action Teams (BAT) are collaborating to strategically plan for better access to and expansion of broadband internet across the Methow Valley. The Methow Valley BAT meetings have shown significant progress leading to measurable planning, including issue identification, some preliminary goal discussions, initial mapping, and a consideration of fiber and wireless alternatives. The final plan will help to anchor institutions, public and private partners, as well as other community stakeholders who are willing pursue strategic measures in order to improve access to and expansion of broadband in Methow Valley, and ultimately serve the economic and community development interests of the region.

In 2018, the Broadband Action Team (BAT) was formed under the auspices of TwispWorks and the Twisp PDA to address the broadband deficit, facilitate stakeholders, and form a plan of action. This is an effort to bridge the digital divide in our community. The BAT will utilize a formal planning process to accurately identify the problems, set preliminary goals, inventory local data and conditions, analyze that data and conditions, select alternatives and/or a combination of alternatives, and provide specifications for actual implementation projects and program evaluations.

The BAT has also developed the following community and economic development goals that would benefit from the presence of broadband. Those goals include economic development, public safety preparedness and response, and access to healthcare and education that rely on a strong broadband internet connection for rural communities across the US. Increasing the quality of, and access to, broadband, and the implementation of a wireless broadband emergency management system is a widespread community goal for the Methow Valley. As a region, we know broadband knows no boundaries, and this local effort has required the involvement of many regional and state level stakeholders including Okanogan County Electric Coop (OCEC), Okanogan County PUD, Okanogan County, Colville Confederated Tribes, and local retail service providers. More information on the BAT can be found [here](#).

2. Background

Many residents of the Methow Valley live below the poverty line and have limited access to affordable, high-speed Internet services. This lack of access has impacts on education, economic growth and viability, emergency services, and quality of life. Simply put, this area lacks reliable wide-spread broadband access necessary to overcome these challenges.

The benefits of a successful broadband expansion include improved economic vitality, more education opportunities for residents, better communication in times of regional emergencies, and a better quality of life.

Working on contract with the Twisp Public Development Authority (PDA), TwispWorks formed the Methow Valley Broadband Action Team (BAT) in 2018. The BAT was created to address affordable, reliable, and high-speed broadband Internet service. Members of the BAT include Andy Hover, Okanogan County Commissioner; Soo Ing Moody, Mayor of Twisp; Sally Ranzau, Mayor of Winthrop; Don Linnertz, Executive Director of TwispWorks; Don Rudolph, Senior Consultant, Network Computing Architects; and Harry Grant, Methow Valley resident. The vision of the BAT is to increase the accessibility, reliability and quality of broadband in unserved or underserved communities in the Methow Valley.

There are three phases to the work the BAT is driving:

- Phase I (2018): Identify stakeholders, obtain community input and create a broadband work plan (**COMPLETE**)
- Phase II (2019): Conduct a technical assessment and create a technical implementation plan
- Phase III (2020): Execute the technical implementation, promoting improved broadband as noted in our vision statement

Phase I: The BAT's focus is on the geographic area within the Methow Valley School District boundaries. The BAT has met regularly and completed the following components of the first phase of the work plan:

- Assess community opinion on the quality of current broadband service
- Identify how current broadband service is being delivered (who are the service providers, what are their service areas and what technologies are being used for the provision of their services?)
- Identify the areas that are currently underserved or unserved
- Determine how various stakeholders could help to meet the goal of improving broadband service in the Methow Valley

The BAT has completed Phase I by taking the following Steps:

- Contracted with Partners for Rural Washington to conduct an initial assessment and work plan that was delivered January 2019 (Report can be found [here](#).)
- On October 10, 2018, held a community-wide meeting with approximately 40 attendees and conducted a community online survey, securing responses from 268 residents to receive community input on the current state of broadband access in the Methow Valley
- On October 4, 2018, met local Internet Service Providers (ISP's) including the public backbone provider Okanogan County PUD to assess current broadband capabilities and needed infrastructure. In addition to Okanogan County PUD, ISP providers and other stakeholders in attendance included NCI Datacom, the Colville Confederated Tribes, Noel Communications, Okanogan County Electrical Co-op, Okanogan County, TwispWorks, the Towns of Twisp and Winthrop and citizens.

Phase II: The second phase is conducting a technical and infrastructure assessment and will include the following items:

- Identify and pursue funding for a technical assessment to fully understand our current infrastructure capabilities and future needs (**COMPLETE** – announcement can be found [here](#).)
- Conduct a second online community survey to gather additional information about ISP's used by customers, levels of internet speed and exact addresses/locations of those indicating a desire/need for better service, and possibly other relevant data. This will help with future broadband network mapping and design, cost estimating for improvements and with evaluating

how best to structure permanent financing for needed improvements and the subsequent cost impacts on ratepayers.

- Create an Advisory Committee that will include representatives from local businesses, internet service providers, healthcare providers, the school district and the community at-large
- Secure funding for a technical and infrastructure assessment, advancing our discussion with ISPs and the community and creating an advisory council made up of a cross section of our community will improve our ability to define specific goals for Methow Valley broadband, based on an analysis of what current broadband service delivery is in terms of speed, placement and reliability. We also want to understand where and why the areas of poorer service exist and what the community would like to see Methow Valley broadband look like in the future.
- Our goal is to complete the technical assessment phase in 2020.

Phase III: Once the technical assessment phase is complete, we will move to the final phase: the execution of a technical implementation plan for improving access and reliability of broadband to the Methow Valley in 2020. To achieve sustainability, stakeholder input facilitated through the planning process is required and will reflect our shared values of respect for our natural environment balanced with the built environment, and bolstering the economic opportunity for each community member and stakeholder.

3. Anticipated Scope of Work

- 3.1. Facilitate Joint Planning Roadmap with Stakeholders. The consultant will host one or more meetings with representatives of the Okanogan PUD, Okanogan Electric Coop (OCEC), Methownet, Century Link, NCI Datacom, the Colville Confederated Tribes, Noel Communications and select community stakeholders. This task will include the development of a published road map work plan and timeline.
- 3.2. Identify Industry Role Models/Best Practices. Contact and interview a minimum of 3 similar sized public utilities, ports, or other entities that the consultant might deem useful who have successfully expanded broadband infrastructure in their service territories. Identify significant relevant information pertaining to the operational success of the telecommunication utility, such as:
 - Services Provided
 - Technologies Deployed
 - Customer Groups Served
 - Funding Sources Utilized
 - Revenues Gained
 - Rate Schedules
 - Market Shares
 - Operating Costs
 - Staffing Requirements
 - Partnerships Utilized
 - Challenges Overcome
 - Local Economic Impact
- 3.3. Perform Local Market Analysis. Assess supply & demand for broadband service in the Methow Valley service territory defined by the boundaries of the Methow Valley School District. Hold a minimum of 2 focus group sessions to determine satisfaction with current

service or desire for new service with each of following customer categories: residential, commercial and institutional. Document uses including education, manufacturing, healthcare, general business, media production, or other uses the consultant or BAT/stakeholders determine. Contact and interview local incumbent service providers to discuss their service territory, current and future service offerings, investment/growth plans, barriers to growth and opportunities for collaboration.

- 3.4. Inventory & Map Local Infrastructure & Demand. The consultant will inventory existing telecom and fiber assets (PUD or otherwise) in the Methow Valley service area. Consultant will work with PUD GIS specialist to plot inventory data gathered into mapping fields alongside additional maps of existing internet user areas by ISP and type of service purchased; map of speeds available by location; and other available data. Special attention will be given to the identification of areas of unserved and underserved customers in the Methow Valley.
- 3.5. Model Broadband Infrastructure Expansion Projects. Consultant shall model case studies for each of the following levels of infrastructure expansion. Each case study should include route mapping, cost estimates, technology deployed, equipment required, timelines to completion, regulatory checklists, permits required, contractors needed, partnerships (public or private) to complete and operate the model. Expansion models will include, but not be limited to the following expansion scenarios:
 - PUD buildout plus connections to adjacent institutional, commercial, and or residential customer clusters
 - PUD buildout plus multiphase hybrid fiber and wireless buildout to all customers in the PUD's service area
- 3.6. Perform Business Case Evaluation on Each Expansion Model. Each expansion model developed will be examined by the consultant to determine the business case for proceeding with the model. The business case shall include but not be limited to the feasibility/achievability of the model, barriers to success, estimated economic development impact (to both the PUD and the Methow Valley) if built, regulatory limitations, and lifespan of usefulness of the model if built. The analysis will be reviewed by the stakeholder group and any additional feedback provided will be incorporated.
- 3.7. Identify & Recommend Funding Options for Each Expansion Model. In addition to providing cost estimates of building the expansion models, the consultant will analyze and provide options and recommendations for funding each expansion model. Funding options should include fees, rates, line extension agreements, local utility districts, etc.; and external sources such as leases, loans, grants, etc.
- 3.8. Identify potential partnerships (public or private) that would enable the PUD to provide better or additional services.
- 3.9. Recommend Action Plan. Based on all information gathered, the consultant shall outline an action plan for expanding broadband infrastructure in the Methow Valley. The plan shall include recommended projects, proof of concept pilot projects, timelines, and any

other necessary information for the PUD and stakeholders to successfully undertake the recommendations.

4. Duration

Estimated Schedule for Public Project Completion Task Estimated Date (Month/Year)

<u>Task</u>	<u>Date</u>
Consultant Service Chosen	10/29/2019
Consultant Begin Work	12/19/2019
Consultant Draft Report	06/30/2020
Consultant Final Report	09/30/2020
Consultant End Work	10/15/2020
Project Complete	11/01/2020

5. Requirements and Deliverables from Consultant

The Methow Valley BAT has identified several consulting needs that are summarized below. The successful consultant and the Methow Valley BAT will further refine the scope of work and schedule during the contract negotiation process.

- a. Facilitate Joint Planning with the BAT Team and its Stakeholders
- b. Identify Industry Role Models and Best Practices
- c. Perform Local Market Analysis
- d. Inventory and Map Local Infrastructure and Demand (or Need)
- e. Model Broadband Infrastructure Expansion Projects
- f. Perform Business Case Evaluation on Each Expansion Model
- g. Identify and Recommend Funding Options for Each Expansion Model
- h. Recommend Action Plan
- i. Bill of Materials and Rough Order of Magnitude (BOM and ROM) for equipment and services

6. Proposal Process and Submission of Qualifications

Please provide the following information in an organized fashion in the order listed. Failure to provide enough information may lead to the Methow Valley BAT determination that the consultant's qualifications are not responsive to this Request for Proposal (RFP).

Letter of Interest and Introduction

Please describe your interest in the anticipated scope of work.

Qualifications and Prior Performance

Provide information, including references, on two to three other similar projects the firm has been involved in the last 3-5 years, that are considered to be similar to the anticipated scope of work. Provide a sample of a prior study as Appendix A.

Project Management

Identify the project manager and any additional sub-consultants to be used on the project. Provide a summary of qualifications and experience for the project manager and other consultants including work on similar studies. Identify to what extent travel expenses could affect the project cost. Describe the project management approach to be used, including how costs will be managed and controlled.

Proposed Staff

List the experience and number of years with the firm for the key members of the staff proposed. Also include the experience of any proposed sub-consultant staff. Local experience and prior experience with Methow Valley BAT and/or rural communities is considered desirable. Resumes may be included as Appendix B.

Staff Availability

Demonstrate your ability to provide the proposed staff for the studies and the ability to perform the anticipated scope of work in a timely manner. Indicate your anticipated schedule following the receipt of the Notice to Proceed, including total duration of the project to completion.

Demonstrate Your Understanding of the Methow Valley BAT's Needs

List and briefly describe what you think are important issues and what your approach would be for successful completion of the anticipated scope of work. Include a discussion of schedule and milestones that may impact the timely completion of the studies.

Proposed Contract and Agreement

The Methow Valley BAT has included a proposed Contract for Professional Services and a Non-Disclosure Agreement in this RFP. The consultant shall indicate if it is willing to execute the Methow Valley BAT's proposed Contract and Agreement with or without exceptions.

Qualifications Submission Format and Deadline

The consultant's qualifications shall be submitted as a single PDF document, not to exceed 40 letter sized pages. Graphics shall be kept to a minimum. Appendices for references and resumes will not be counted in the page totals. Send qualifications (via email) to:

Qualifications submitted by other means will not be accepted. Qualifications submitted after the deadline date and time will not be accepted.

7. Milestones and Schedule

<u>Milestones</u>	<u>Completion</u>
RFP Advertisement	09/03/19
RFP Response due	09/30/19
Short List Consultant Interviews	10/03/19
Scope of Work Negotiations	10/08/19
Consultant Service Chosen	10/29/2019
Consultant Begin Work	12/19/2019
Consultant Final Report	10/15/2020

8. Evaluation Criteria - Review and Selection Process

Consultant selection will be based on the evaluation of qualifications unless it is deemed necessary by the Methow Valley BAT to conduct interviews of closely scored consultants. The consultants determined best qualified to perform the studies will be recommended to the Twisp PDA for acceptance, subject to successful negotiation of a contract for professional services.

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A select group of Methow Valley BAT members and other stakeholders will review all submitted qualifications. The review team will recommend finalists for interviews and those finalists will be notified via email. The review team will interview finalist on October 3rd and October 4th and select the final consultant no later than October 29th. Qualifications submitted will be ranked based upon the merits of the written qualifications and experience of the firm or consultant team. Each reviewer will award a score based on a 40 point total as follows:

- 8.1. Demonstrated understanding of the needs of the Methow Valley BAT and its proposed Scope of Work. (5)
- 8.2. Qualifications of the project team. (10)
- 8.3. Experience working with rural communities and/or small to medium sized public utility companies. (10)
- 8.4. Degree to which the project design approaches goals with innovative and creative solutions or methods. (10)
- 8.5. Likelihood that the chosen proposal will provide the best value in comparison to other submitted proposals. (5)

9. Contract Award and MOU w/Consultant

The Twisp PDA is the contracting agency. The BAT will make a recommendation to the PDA and reserves the discretion to:

- 9.1. Recommend a contract for Professional Services for all, any, or any combination of the anticipated scope of work described within the RFP.
- 9.2. Reject any and all consultant qualifications considered by the Methow Valley BAT to be non-responsive or not in the best interest of the Methow Valley BAT.
- 9.3. Request further information, or presentations from consultants as needed to support the Methow Valley BAT selection of the most qualified consultant.
- 9.4. Select any consultant that in the opinion of the Methow Valley BAT is most qualified.
- 9.5. Modify the anticipated scope of work, and milestones and schedule.

Should you have any questions or wish to request any additional information, please email:

info@twispworks.org

You may also direct questions to 509-997-3300, extension 2