

# Residential Retrofit Technical Assistance Session

Solicitation No. 2025-MBI-08 – Closing 3/11/2025

Please keep yourself on mute until the Q&A.

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

February 27, 2025

**MBI**

MASSACHUSETTS  
BROADBAND INSTITUTE



at the MassTech  
Collaborative

# Technical Assistance Session Objectives

## Objectives

1. Elaborate on Round III Project Group Structure
2. Provide general best practices for submitting a complete and compliant application.
3. Document and respond to any final questions prior to application submission.

# Agenda

1. Q&A Update
2. Review Round 3, Project groups
3. Selected Application Components for Review
4. Application Tips and Post-Application Process
5. Questions

# Q&A Update

Q&A Document for RFP III has been posted to solicitation website:

Full details included in the solicitation linked below.

<b>Team Lead:</b>	Jessica Boulanger, <a href="mailto:proposals@masstech.org">proposals@masstech.org</a>
<b>Date Issued:</b>	Tuesday, February 4, 2025
<b>Bidder's Conference:</b>	Monday, February 10, 2025 at 1:00 p.m. <a href="#">Recording</a>   <a href="#">Slides</a>
<b>Questions Due:</b>	Friday, February 14, 2025 <a href="#">Submit Questions Here</a>
<b>Answers to Questions Posted:</b>	Tuesday, February 25, 2025
<b>Technical Assistance Session:</b>	Monday, February 27, 2025 at 11:00 a.m. <a href="#">Register</a>
<b>RFP Responses Due:</b>	Tuesday, March 11, 2025 by 5:00 p.m. EST
<b>Notification of Award:</b>	April 2025

## Procurement Process



- A [Request for Information \(RFI\)](#) was posted on March 20, 2024 to collect information to a set of questions which will inform the structure of a formal procurement to award projects to qualified providers. The RFI closed on April 17, 2024.
- The first formal [Request for Proposals \(RFP\)](#) for this program was announced in Spring of 2024. Quarterly RFPs will be posted with updated eligible locations based on housing operators completing the Expression of Interest Form.
- [Round II Request for Proposals \(RFP\)](#) was posted September 16, 2024.
- [Round III Request for Proposals \(RFP\)](#) was posted February 4, 2025.

MBI recommends reviewing both the RFP I, II, and RFP III Q&A documents before submitting an application.

# Project Groups Round 3 Explained

*Project groups are larger in size and regional in nature*

## Previous Grant Rounds

- Project Groups consisted of not more than 5 locations under common ownership.
- Due to lower unit counts among smaller housing operators, MBI observed many locations not receiving bids.
- ISP feedback indicated minimum Project Group sizes of 100 units to incent bids.

## To address this

- MBI created larger Project Groups to be more attractive from a market perspective and to ensure service provision to smaller participating housing operators and development sites.
- MBI has increased the distance of fiber that can be covered by the grant from .5 miles to 1 mile to accommodate increased last-mile distances under larger project groups

# Project Group Map Explained

## Download Application Documents:

- [Download Solicitation No. 2025-MBI-08 \(PDF\)](#)
- [Download Amendment 1 Round III \(PDF\) \*\(amended 2/24/25\)\*](#)
- [Download Questions & Answers Document \(PDF\)](#)
- [Download Attachment A Budget Template \(Excel\)](#)
- [Download Grant Agreement Template \(Word\)](#)
- [Download Sample Officers Certification of Compliance \(PDF\)](#)
- [Download Application \(PDF\)](#)
- [Click here for Project Group Summary Overview](#)
- [Click here for Project Group Development Details \*\\*Development details have been updated stories and unit counts of participating developments.\*](#)
- [Click here for Project Group Webmap](#)



[Apply Here](#)

[Web Map Demo](#)

# Project Groups Round 3 Explained – Application Adjustments

With larger regional project groups, site-specific network designs at the project group level are infeasible. To address this issue, MBI is requesting that operators provide a general network design concept at the organizational level that should reflect a standard approach to installation.

This is requested in section 2.5 of the application.

# Project Groups Round 3 Explained – Contract Implications

- Currently, a Project Group and all associated properties, along with the scope of work, schedule, and budget, are documented in an exhibit within the contract.
- Awardees submit invoices to MBI based on Milestones related to a given project group.
- Due to the large nature of project groups, MBI anticipates disaggregating project groups at the time of contracting to smaller exhibits to allow for more feasible invoice schedules.



# Project Groups Round 3 Explained – Contract Implications

<b>Grant Milestone</b>	<b>Disbursement Requirement</b>	<b>Disbursement Amount</b>	<b>Documentation Required*</b>
Payment #1	Development of Detailed Construction Plans and Network Designs	Up to 25% of award amount	Report on Project's progress, expenditures to date, risks, and impact Photo documentation of pre-construction conditions. Detailed documentation of project expenses Certification of completion of milestone
Payment #2	Submission of approvals for permitting, licensing, and access necessary for construction	Up to 50% of award amount	Report on Project's progress, expenditures to date, risks, and impact Detailed documentation of project expenses Fully executed fiber IRU Certification of completion of milestone
Payment #3	Completion of fiber to the building(s), construction and installation of fiber termination point and associated networking equipment	Up to 75% of award amount	Report on Project's progress, expenditures to date, risks, and impact Photo documentation of project activities. Detailed documentation of project expenses Certification of completion of milestone
Payment #4	Project completion	Up to 100% of award amount	Final Report Photo documentation of post-construction conditions. Certification of project completion signed by Participant and Property Owner

# 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.

# Post Application

1. Applications that meet Threshold Criteria are reviewed for score and bonus criteria.
2. MBI will score applications, the highest scoring applicant will be considered the awarded provider.
3. MBI will bring Round III awards to April MTC Board Meeting for approval.
4. Upon approval from MTC board, MBI will introduce the highest scoring applicant to the operator(s) for site visit execution
5. Applicant may conduct a site visit within 45 days of award
6. Upon completion of the site visit, applicant may resubmit budget materials via MBI invitation link.



# Questions and Answers Session



# Appendix

# Reference the following sections of the Solicitation

## Threshold Requirements Section 7.1

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

## Scored Criteria Section 7.2

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

## Bonus Scoring Criteria Section 7.3

- 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!**

# Evaluation Criteria

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
<b>TOTAL POINTS</b>		<b>100</b>

# Evaluation Criteria

	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.**



# Application Section 2.1: Service Level Agreement

- *Applicants must submit a Service Level Agreement (SLA) that confirms that service plans for residents of properties funded under the Residential Retrofit Program will not subject end-users to data caps, surcharges, or usage-based throttling.*
- *Submitted SLA's must also outline information regarding the service provider's typical response time, data sharing, communication standards to close feedback loop on service requests (including delays, other agencies' timeline impacts, service resolution or completion, maintenance related outages, etc..).*

# Application Section 2.1 Property Owner Access Agreement

*Applicants must submit 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. MBI will review this draft agreement and share any feedback or changes needed before a successful Applicant enters into the agreement with a Property Owner.*

Notes MBI Has Provided Include:

- 100% Grant Funded Program - no costs or liability on housing operator
- ISP owns all equipment, including wiring
- ISP maintains and repairs equipment

# Application Section 2.1 Fiber Access Description

*Please provide a description of how your organization will ensure ongoing access to service coils at egress/ingress points of any fiber extension and drop to any Property.*

*Examples:*

- Example #1 – (ISP/MSP) will install a 24 strand fiber optic cable as outside plant, originating at a splice enclosure on a pole span (A point) and terminating inside of a cabinet in the MDF within the building (Z point). (ISP/MSP) will make service coils available to MBI at the A and Z ends of the fiber optic cable for 3 of the 24 strands.
- Example #2 – (ISP/MSP) will subcontract with (commercial fiber provider) to provide lit service at the project group. (Commercial fiber provider) will provide 24 strands of dark fiber to (ISP/MSP) that will terminate in the building utility closet (Z point). (Commercial fiber provider) will make the 21 strands of dark fiber available to (ISP/MSP) and 3 strands of dark fiber available to MBI at a location such as on a pole or in a colocation facility (A point).
- Example #3 – (ISP/MSP) does not intend to use funds to construct fiber cable into the building. Either usable fiber cable already exists in the building, or (ISP/MSP) intends to lease lit service(s) from a commercial fiber provider and that provider will construct the fiber without subsidy from MBI.

## Pricing Matrix

Please complete the following table regarding pricing for your organizations baseline general customer broadband service packages. If your organization does not provide service at a given level, please indicate N/A in the text box.

	Broadband Download Speed (Mbps)	Broadband Upload Speed (Mbps)	Standard Price per Month	Income Eligible Price per Month	Income Eligible Price per Month with Lifeline Benefit, if Applicable
Broadband Only (minimum 100/20)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Broadband Only (minimum 100/100)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Broadband Only (minimum 200/200)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Broadband Only (minimum 500/500)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Broadband Only (minimum 1000/1000)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

# Application Section 2.2: Pricing Matrix

If you do not plan to offer a pricing option for a service level, please indicate N/A

# Application Section 2.4: Financial Capacity

- If an applicant wishes to have MBI treat certain information or documentation as confidential, the Applicant must submit a written request to MassTech's General Counsel, Jennifer Saubermann - saubermann@masstech.org - prior to submission.
- The request must precisely identify the information and/or documentation that is the subject of the request and provide a detailed explanation supporting the application of the statutory exemption(s) from the public records cited by the Applicant.
- The MassTech General Counsel will issue a written determination within ten (10) business days of receipt of the written request.
- If the MassTech General Counsel approves the request, the Applicant shall clearly label the relevant information and/or documentation as "CONFIDENTIAL" in the application.
- Any statements in an application reserving any confidentiality or privacy rights that is inconsistent with these requirements and procedures will be disregarded.

# Financial Capacity Cont.

- Five (5) years of audited financial statements or financial records of the Applicant and parent company;

Or

- If the Applicant does not have audited financial statements, the Applicant must submit five (5) years of unaudited financial statements along with a statement signed by either the Applicant's chief executive officer or chief financial officer affirming that the unaudited financial statements are true and correct.

# Financial Capacity Cont.

- Applicants **must also** provide evidence of officer certification of compliance with local, state, and federal tax laws and compliance with all applicable regulatory requirements.

An example of such a certification letter is available for download on the solicitation webpage.

# Application Section 2.5: Network Design

- Applicants must provide a response to all segments of this section. TBD or contingent upon site visit, are not an acceptable responses and will warrant disqualification.
  - Construction Methods
  - Fiber Handoff
  - Aerial/Underground
  - CPE



# Application Section 2.5: Network Design

- If an applicant cannot make a firm determination regarding components of the network design (construction methodology, underground vs aerial, CPE, etc.) the applicant is recommended to provide criteria for consideration that would inform an approach or reference to their standard practice in other locations as an example of how they typically conduct similar work.

# Application Section 2.6: Previous Experience

- Applicants must provide examples of at least 1, and up to 4 successful projects of a similar size and scale to meet the requirements of this section.
- In examples, the following criteria must be included.
  - a) Overview of project size and scale, making specific reference to number of units/customers served, timeline for project execution, subcontractors used.
  - b) Project narrative outlining the key project activities, processes (construction, installation, service delivery) and outcomes.
  - c) Technical summary outlining the technologies and equipment used along with specific notation of how the technology deployed aligns with the minimum network requirements outlined in section 7.1.1 of this RFP.
  - d) Description of what funding sources were used to support these programs. If grant funds were used, please describe the conditions and reporting requirements of the grant and how the applicant met those requirements.

Note: The above descriptions of experience and readiness should justify the number of units the Applicant has proposed to serve in its Application.

Each project submitted will be eligible for 4 or 0 points for a total of 16 points.

# Application Section 3.5: Community Benefits

- Commitment to provide free Wi-Fi in common areas of the building.
- Commitment to provide devices (laptops w/ minimum 8GB RAM, 128GB storage, CPU equivalent to Intel Core i3) to residents at a ratio of at least 1 device for every 4 units.
- Commitment to contract with a third-party digital literacy or navigation training partner to provide services on site. Must be supported by a signed letter of commitment from that service provider.

MBI will not award points for anything other than the above items.

# Application Tips

After completing the General Applicant and Standard Business Practices Information sections of the online application, the applicant will select which of the [Project Groups](#) they are interested in providing improved broadband service to under this grant program.

**Once an applicant moves to this section of the application, they will not be able to return to Sections 1 or 2.**