



## **Central Sierra Economic Development District**

### **Broadband Utility Zone (CSBUZ)**

#### **REQUEST FOR PROPOSALS**

### **Contract Services for California Advanced Service Funds (CASF) Consortia Grant Implementation**

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#### **PROJECT DESCRIPTION SUMMARY**

The Central Sierra Economic Development District Broadband Utility Zone (CSBUZ) is requesting proposals from qualified respondents for research and development, planning and data analysis and to administer and implement the California Public Utilities Commission (CPUC) CASF Rural and Urban Regional Broadband Consortia Grant Account (Consortia) funds in compliance with the requirements of the CPUC for the Counties of Alpine, Amador, Calaveras, Mariposa, and Tuolumne. It is anticipated that one consultant or firm will be selected to perform all services related to this RFP. The CSBUZ reserves the right to terminate this project prior to selection of a qualified respondent as well as reject any and all responses submitted.

#### **BACKGROUND**

On January 13, 2023, the CSBUZ was recognized and awarded a three-year CASF grant to focus on creating regional capacity to collaborate with CPUC, local government, ISPs, stakeholders, and consumers to achieve broadband connectivity success; directly assisting ISPs with obtaining last mile CASF grant funds; and developing enhanced GIS mapping tools to detail unserved and underserved households & businesses and provide data for mapping deficiencies. CSBUZ's Work Plan and Performance Metrics Plan are directly related to SB 156 and AB 164 goals and objectives, and consistent with program requirements under the CPUC Resolution T-17778 attached as Exhibit A.

CSBUZ representation includes local city, county, and regional government, public safety, K-12 education, health care, libraries, higher education, community-based organizations, tourism, parks and recreation, agricultural, and business. CSBUZ received sixteen endorsements from local governments, ISPs, educational institutions, Board of Supervisors, and non-profit organizations. CSBUZ's members have experience and success in achieving broadband deployment, communication strategy, product marketing and development, transportation

sector, public and private sectors, anchor institutions, technology industry, and educational institutions.

Public outreach and stakeholder collaboration is a vital component of the CASF consortia process, and RFP proposal responses should incorporate strong public outreach/collaboration elements, as well as effective grant management and documentation experience.

## **SCOPE OF WORK**

### ***Project Goals***

The project is expected to meet or exceed Work Plan objectives including conducting marketing/outreach and developing strategies; identifying potential CASF infrastructure projects; assisting ISPs with CASF infrastructure applications; and publicizing wireline testing requests. In addition, the project requires the ability to prepare quarterly and annual reports for Consortium Board approval to submit to the CPUC/CASF, documenting progress and milestones achieved in the Work Plan. The three-year Work Plan with detailed activity descriptions, deliverables, and performance measures are attached as Exhibit B.

### ***Overall Project Objectives***

- Collaborate with the Commission and other state agencies to engage regional consortia, local officials, ISPs, stakeholders, and consumers regarding priority areas and cost-effective strategies to achieve the broadband access goal;
- Identify potential CASF infrastructure projects or potential broadband deployment projects related to new programs created under SB 156 and AB 164, along with other opportunities, where ISPs can expand and improve their infrastructure and service offerings to achieve the goal of reaching 98% broadband deployment in each consortia region;
- Assist with potential CASF infrastructure applicants or potential applicants for broadband deployment projects related to the new programs created under SB 156 and AB 164 in the project development or grant application process;
- Conduct activities that will lead to or that can be reasonably expected to lead to CASF infrastructure projects or broadband deployment projects related to new programs created under SB 156 and AB 164, including the Federal Funding Account, Middle-Mile, Broadband Loan Loss Reserve, and Local Agency Technical Assistance;
- Assist the Commission in publicizing requests for wireline testing volunteers in areas, as needed; and
- Assist CSBUZ with conducting and submitting annual audit reports, as required.
- Organize and hold quarterly CSBUZ meetings to apprise the Consortium Board as to progress made on the Work Plan to gain approval to submit to CASF, and to seek feedback on the Consultant's ability to achieve the goals of CSBUZ.

RFP respondents are required to comply with all grant requirements contained in the August 2023 CASF consortia grant administration manual attached as Exhibit C.

CSBUZ will perform overall grant oversight including final completion of annual reporting requirements.

### **PROPOSAL CONTENT**

In order for CSBUZ to compare and evaluate proposals effectively and efficiently, all proposals shall be organized in the specific format outlined below. Failure to comply with this requirement may cause disqualification. The proposal shall include the following as a minimum:

1. **Cover Page:** Firm or Consultant's name, title of proposal, and date of proposal.
2. **Transmittal Letter:** Shall include the legal name of the agency or organization making the proposal, business address, name, title, address, email address, and telephone number of person(s) authorized to negotiate and contractually obligate the respondent firm and the contact person(s) authorized by the firm to be contacted for clarifications. The letter shall be signed by a principal or officer of the firm.
3. **Scope of Work/Services:**
  - Present the respondent's basic scope of services, objectives and intended results of the services to be provided including a list of all deliverables (i.e. number of meetings to be provided, critical components listed above, CPUC approved CASF consortia grant project objective outcomes, etc.)
  - A summary of how the proposal meets the RFP requirements and why the respondent is best qualified to perform these services including the respondent's financial and technical resources.
  - Discuss any requirements **not** addressed in this RFP and **any constraints** in providing the services listed herein.
4. **Staffing:** List of personnel who will be directly assigned to provide services, together with a discussion of each member's responsibilities and resumes. Include an organizational chart of personnel providing services.
5. **Statement of Experience and Qualifications:** Description of the nature of the respondent's present work, including a comprehensive list of current and past work on similar projects, staff who worked on those projects, and corresponding client's names, titles, addresses and phone numbers. For any projects referenced in the Statement of

Experience and Qualifications, list the involvement of the proposed staff members. Include evidence of any special licensing or qualifications required to perform the work.

6. **Cost Proposal:** A detailed, task-related cost proposal based upon anticipated hours for services is to be provided including hourly rates for each assigned employee, supplies and equipment costs, travel, office support, all other overhead costs and any reimbursable expenses. Each proposed task should be accompanied by a “not to exceed” cap on costs. Basis for charging on a time and materials basis for preparation of optional elements should be listed and fully explained. The respondent shall submit a detailed budget that includes without limitation costs of required staffing and all associated costs to complete the implementation of the CASF consortia grant objectives. **All cost proposals must be in a separate sealed envelope clearly marked “Cost Proposal”.**
7. **Compensation:** Respondents should provide for how they expect to be compensated for all of the services required by the Agreement.
8. **Project Schedule:** The respondent shall submit a detailed proposed schedule identifying all tasks and projected dates of completion for project milestones.
9. **Work Plan:** Detailed description of the approach and methodology to be used to meet the objectives of the project. Include geographic locations where the services are to be provided, quality control measures, numbers of meetings to be held, total participants projected, types of groups or individuals to be contacted reflecting the different stakeholders for the work, specific needs as required, staff assignments, etc.

**EVALUATION CRITERIA**

A review panel composed of CSBUZ staff and officials will rate the initial proposals based upon standardized selection criteria and will select the top two to three consultants/firms to attend interviews.

All proposals are evaluated to determine whether they met all the requirements of the RFP. Responses are individually scored as assigned to a category. Individual scores are averaged and entered in that category column. Each category is assigned a weight and the result is a weighted score.

Each category is assigned a point range of **0 to 20** (0 = Non-existent 4 = Poor 8 = Marginal 12 = Acceptable 16 = Very Good 20 = Excellent). Proposals will be evaluated based on the rating scale and criteria listed below:

<u>Categories</u>	<u>Possible Points</u>	<u>Weight</u>
Quality and Responsiveness of the Proposal	20	15%
Scope of Work/Services	20	20%

Experience and Qualifications & Staffing	20	25%
Project Schedule & Work Plan	20	20%
Cost Proposal	20	20%
<b>Total</b>	<b>100</b>	<b>100%</b>

CSBUZ seeks a firm or a consultant that offers experience in implementing CASF consortia grant objectives particularly in rural areas. The firm that best meets the selection criteria will be selected for this project. Specific evaluation criteria include, but are not limited to:

- Understanding of the project as identified by CSBUZ;
- Basic understanding of the five counties and their broadband opportunities or challenges;
- Understanding of and relevant experience providing the services required, especially for smaller counties in rural areas;
- Experience and qualification of staff assigned to the project;
- Experience of the project manager;
- References and relevant work performed for those references;
- Accessibility of key personnel to County staff;
- Budget and fee structure;
- Willingness and ability to meet deadlines; and
- Ability to comply with insurance requirements.

**PROPOSAL SUBMITTAL**

Proposals submitted must meet the following criteria to be acceptable for consideration regarding this project:

- Submit one (1) electronic copy emailed in PDF format OR one (1) original signed proposal marked “Original”, four (4) bound proposal copies no later than **5:00 p.m. on Friday, December 08, 2023**, to:

**CSBUZ**  
**197 Mono Way, Suite B**  
**Sonora, CA 95370**  
[dthoeny@mljt.org](mailto:dthoeny@mljt.org)

Normal business hours are Monday through Friday 8:00 a.m. to 5:00 p.m. and staff can be reached at (209) 533-3396.

(Note: Firms selected for interview may be required to submit additional copies.)

- The proposal must be submitted in an envelope clearly marked with the name and title of the proposal, along with the respondent’s return address. The Cost Proposal must be

submitted in a separate sealed envelope along with your proposal which specifies on its face “Cost Proposal”.

- Proposals received incomplete or late, for any reason, will not be accepted.
- All proposals submitted in response to this RFP will become the property of CSBUZ and will not be returned. CSBUZ reserves the right to make use of any information or ideas contained in the proposals. The proposal itself shall not constitute a contract, but will, if accepted, be incorporated into the contract between CSBUZ and the selected respondent.
- Proposals submitted to CSBUZ become public documents subject to disclosure once the proposal is awarded. If the respondent considers any portion of their proposal to be confidential, the respondent must label each page of the confidential portions as: “Trade Secret”, “Confidential” or “Proprietary.” The respondent must also list the confidential material at the beginning of its proposal and provide justification for not making such material public. CSBUZ shall have the sole discretion to disclose or not disclose such material, subject to any protective order that the respondent may obtain, but it is incumbent on the respondent to assert its rights to confidentiality.
- Respondents may withdraw their proposals at any time prior to the RFP submission deadline. A signed withdrawal request by the respondent’s duly authorized representative must be provided to [dthoeny@mljt.org](mailto:dthoeny@mljt.org).

***Please note:*** *The successful respondent shall be expected to fully meet all representations made in its proposal, including demonstration of the requirements outlined in this RFP.*

### **EXCHANGE OF INFORMATION & CONFLICTS OF INTEREST**

Exchanges of information between interested respondents and CSBUZ is encouraged to improve the understanding of the requirements set forth in this RFP. Questions concerning the project and/or RFP requirements should be directed to [dthoeny@mljt.org](mailto:dthoeny@mljt.org). Questions will be posted to ensure questions and answers are available for all respondents to view and respond to ensuring an open, fair, and equal process.

Respondents are specifically directed not to communicate with or make attempts to influence any members of CSBUZ’s Evaluation Committee or other department representatives involved in the selection process that would create a conflict of interest or unfair advantage.

Failure to adhere to this instruction may result in disqualification of the respondent.

## **TERMS OF REQUEST FOR PROPOSALS**

**Acceptance of Proposals:** CSBUZ reserves the right to reject any and all proposals and to waive any informality, technical defect, or clerical error in any proposal and to request additional information from all respondents. This RFP is not an offer to contract. CSBUZ reserves the right to request clarification of any information submitted, interview firms and/or request additional information during interviews. CSBUZ further reserves the right to enter negotiations with one or more firms and/or enter into multiple contracts and/or not award a contract.

**Amendments and/or Addendums:** We expect that you may have questions as you prepare your response to the RFP and/or changes may be necessary. To handle questions or changes most effectively and to ensure that everyone has the same information, we request that you promptly send your question(s) to Dave Thoeny at [dthoeny@mljt.org](mailto:dthoeny@mljt.org) or visit [CSBUZ.org/procurements](https://www.csbuza.org/procurements) to view answers to posted questions, see amendments or addendums and/or download information regarding this RFP. Written questions must be received no later than **5:00 p.m. on Wednesday, Nov 29, 2023**. The CSBUZ Director, or his designee, may issue a written amendments or addendum as necessary; or respond to questions which will be posted to [CSBUZ.org/procurements](https://www.csbuza.org/procurements) by October 20, 2023. Amendments/addendums issued must be signed and included in your proposal.

**Oral Communications:** Any oral communication between CSBUZ and the respondent is not binding, nor will it modify the RFP in any way.

**Proposal Cost:** The cost of developing the proposal is the sole responsibility of the respondent; CSBUZ is not liable for any costs incurred by those submitting proposals.

**Basis for Proposal:** The RFP and any amendments to it represent the most definitive statement CSBUZ will make concerning information upon which proposals are to be based. Respondents will be assumed to have thoroughly examined these documents.

**Deliverables:** If this Proposal is awarded, and the successful respondent fails to sign and return to CSBUZ within **fifteen (15) days** (i) the Contract, (ii) any bonds required, and (iii) the required insurance certificates as specified in the Sample Contract/Agreement information and documents with an insurer satisfactory to the Risk Manager, CSBUZ may, at its option, determine the respondent has abandoned the Contract. In that case, the Proposal and the acceptance thereof shall be null and void, and any security shall be forfeited and become the property of CSBUZ.

**Right to Negotiate:** CSBUZ reserves the right to negotiate any fee or any provision, accept any part, or all parts of any and all Proposals whichever is in the best interest of CSBUZ. CSBUZ intends to negotiate only with those firms whose Proposals meet the requirements of the RFP.

**Verbal Agreement or Conversation:** No prior, current, or post award verbal conversations or agreement(s) with any officer, agent, or employee of CSBUZ shall affect or modify any terms or obligations of this RFP, or any contract resulting from this RFP.

**Background Check:** CSBUZ reserves the right to conduct a background inquiry of each respondent, which may include collection of appropriate criminal history information, contractual and business associations, fiscal accountability, business practices, employment histories, and reputation in the business community. By submitting a proposal to CSBUZ, the respondent consents to such an inquiry and agrees to make available to CSBUZ such books and records as are deemed necessary to conduct the inquiry.

### **PROTEST PROCEDURE**

Respondents may file a written protest with CSBUZ not later than **five (5)** working days after the date of **evaluation notification by CSBUZ's designee which may be by telephone, letter and/or email.**

The protest shall be delivered or sent by registered mail to 197 Mono Way, Suite B, Sonora, CA, 95370.

The protest filed shall:

- Include the name, address, and business telephone number of the protestor;
- Identify the project under protest by name, RFP/Q number, and RFP/Q date;
- Contain a concise statement of the grounds for protest including alleged violations of Federal, State, or local law; provided, however, RFP or RFQ process and procedures, including evaluation criteria, shall not be proper grounds for protest. Concerns related to those issues should be raised and addressed, if at all prior to the proposal opening date to allow adjustments before evaluation of proposals and;
- Provide all supporting documentation, if any. Documentation submitted after filing the protest will not be considered during review of the protest or during any appeal.

### **PROTEST REVIEW**

Upon receipt of a protest, CSBUZ's designee shall review all the submitted materials and shall create and retain a written record of the review. The designee shall respond in writing at least generally to each material issue raised in the protest not later than **fifteen (15)** working days after receipt of the protest.

If the protested procurement involves Federal or State funds, the designee shall give notice to the interested party that he or she has the right to appeal to the appropriate Federal or State agency which shall be identified by name and address. An appeal hereunder shall be filed with the appropriate agency within **five (5)** working days of the dispatch of notification to the interested party(ies).



CSBUZ designee decisions may be appealed in writing to CSBUZ prior to the award date, which is given in the notification. CSBUZ shall review and decide the appeal based on the grounds and documentation set forth in the original protest. The appealing party may be represented by legal counsel if desired. Each party shall bear its own costs and expenses involved in the protest and appeal process, including any subsequent litigation. The decision of CSBUZ shall be final unless the protested procurements are obtained in whole or in part with Federal or State funds.

**EXHIBITS**

- A - CPUC Resolution T-17778
- B - Work Plans
- C - Grant Manual

\*All exhibits annexed and attachments hereto are expressly made a part of this RFP as though fully set forth herein.