



# Montana Broadband Communications Advisory Commission Meeting

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March 6, 2024

# Topics of Discussion for March 2024 Commission Meeting



- BEAD and Digital Opportunity Plan Updates
- Challenge Process Update
- Prequalification
  - Overview
  - Timeline
  - Application Components
  - Application Intake Portal
- Main Round
  - Timeline and Review Approach
  - Application Components
  - Scoring Overview
- Stakeholder Engagement and Technical Assistance Timeline

# BEAD and Digital Opportunity Plan Updates



## Approved

Initial Proposal Volume 1

## Updates

Digital Opportunity Plan

Initial Proposal Volume 2

## What to Expect Next

- IPV2 curing and resubmission (Feb 2024)
- IPV2 approval by NTIA (TBD)
- Final Proposal drafting (Fall 2024)
- Final Proposal CAC approval (Dec 2024)
- Final Proposal submission to NTIA (Jan 2025)

# Challenge Process Updates



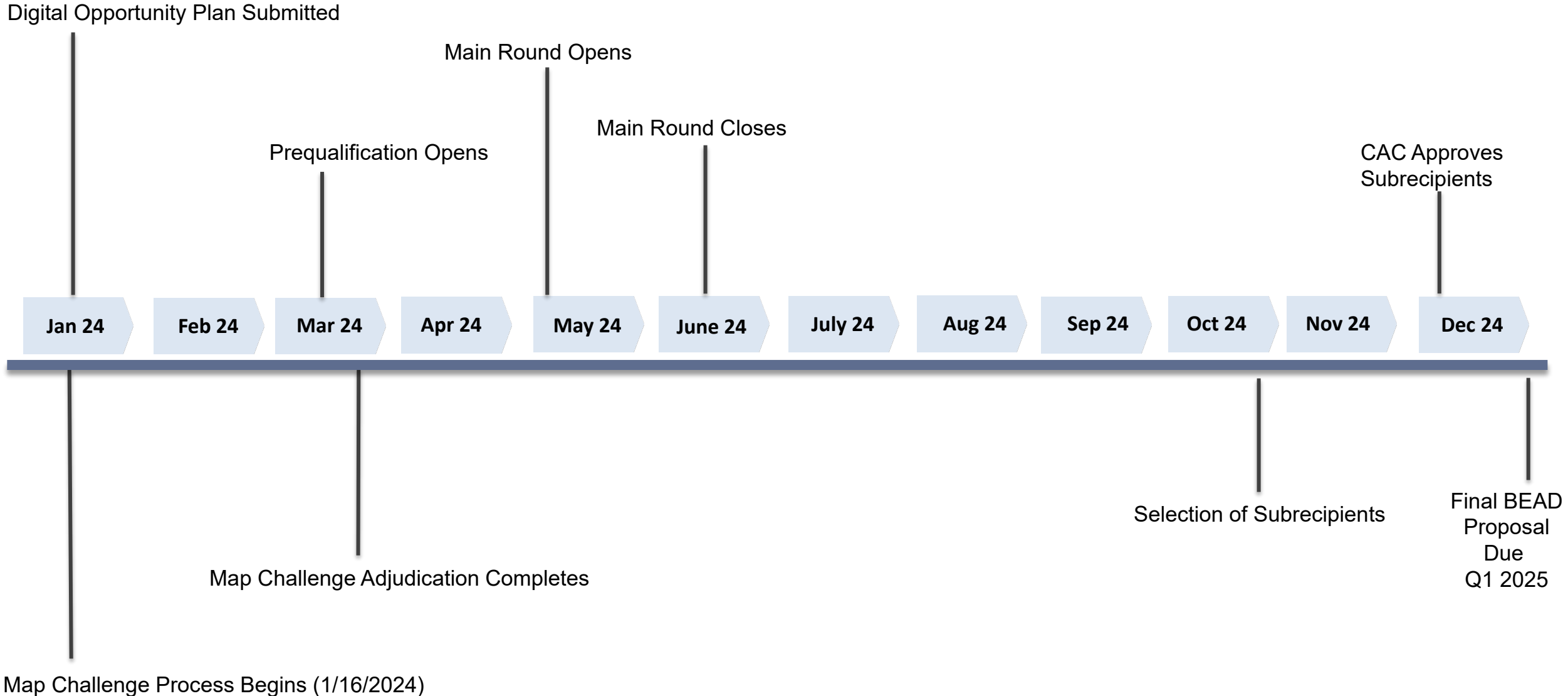
## Challenge Phase

Initial Challenge Phase Closed February 15, 2024

## Rebuttal Phase

Rebuttal Phase Opened February 27, 2024

# Estimated 2024 Month by Month IJA Program Timeline



\*Full allocation received upon approval of IPV2

\*\*All dates subject to timely NTIA approval of IPV2

# Prequalification Overview

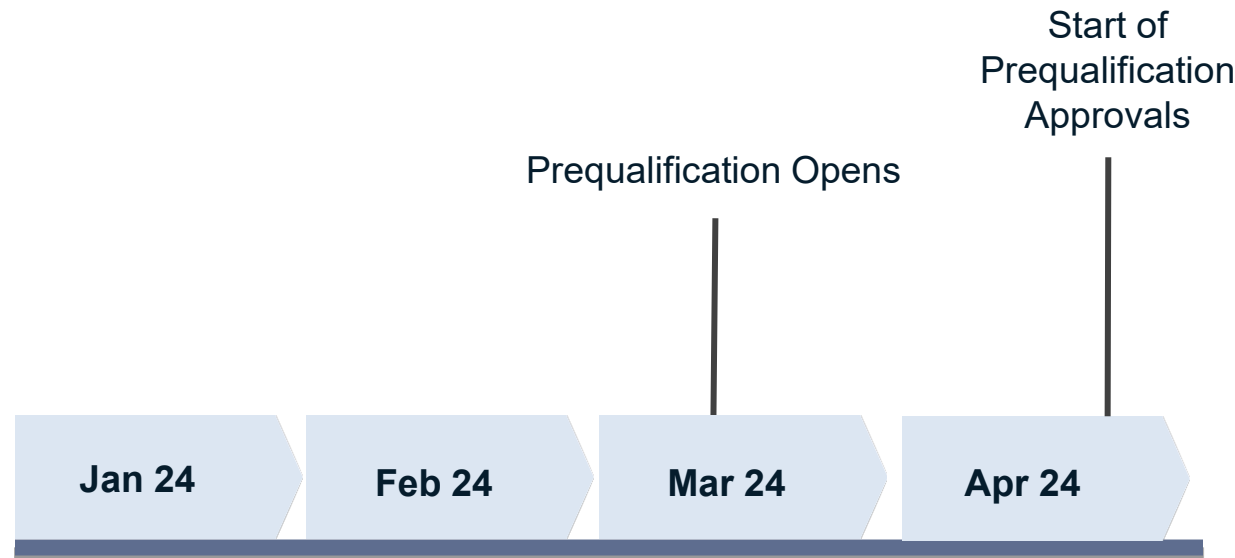


- **Purpose**

- The purpose of the prequalification process is to evaluate the eligibility status of each intended applicant to ensure these entities have a smooth main round application process.
- Enables applicants to have a smooth main round application process

- **Timing**

- The prequalification application will be available in early March
- Providers who intend to apply during the main application round must have an approved prequalification application prior to receiving access to the Main Round application.



\*\*All dates subject to timely NTIA approval of IPV2



# Prequalification Components



Component	Requirement	Review Standard
<b>Financial</b>	<ul style="list-style-type: none"><li>• Financial Statements</li><li>• Executive Authority for Financial Capability</li><li>• Letter of Credit</li></ul>	Review for indicators of financial stability, appropriateness of plan for letter of credit and completed certification.
<b>Organizational</b>	<ul style="list-style-type: none"><li>• Resumes of Key Management Personnel</li><li>• Roles and Responsibilities</li><li>• Organizational Chart</li><li>• Prior Broadband Experience</li><li>• Current Broadband Deployment Projects</li></ul>	Review for qualifications of key personnel, completeness of organizational chart, evidence of ability to execute projects of similar size and scope.
<b>Certifications and Compliance</b>	<ul style="list-style-type: none"><li>• Staff Certifications and Compliance</li><li>• Environmental, Historical, and BABA Requirements</li><li>• Legal Opinion</li><li>• Health and Safety</li><li>• Prior Service and FCC Form 477</li><li>• Business Registration</li></ul>	Adherence to all required certifications and compliance requirements.

# Prequalification Components



Component	Requirement	Review Standard
<b>Federal Labor and Employment Law</b>	<ul style="list-style-type: none"><li>• Federal Law Compliance</li><li>• Labor and Employment Practices</li></ul>	Ensure applicants comply with all requirements or provide a narrative account with mitigating steps
<b>Risk Management</b>	<ul style="list-style-type: none"><li>• Cybersecurity</li><li>• Supply Chain</li></ul>	Ensure proper risk management plans are in place and that applicant commits to period reevaluation and update of plans
<b>Ownership</b>	<ul style="list-style-type: none"><li>• Disclosure of relevant ownership information</li></ul>	Ensure compliance with application guidelines



# Prequalification Application Intake



- **Application Registration Opens**
- **Navigating the Applicant Portal**
  - Once registered and in the applicant portal, users can edit their information or add Users through the Account Information section.
  - User roles: Editor vs Administrator
  - Editor can modify application but cannot submit

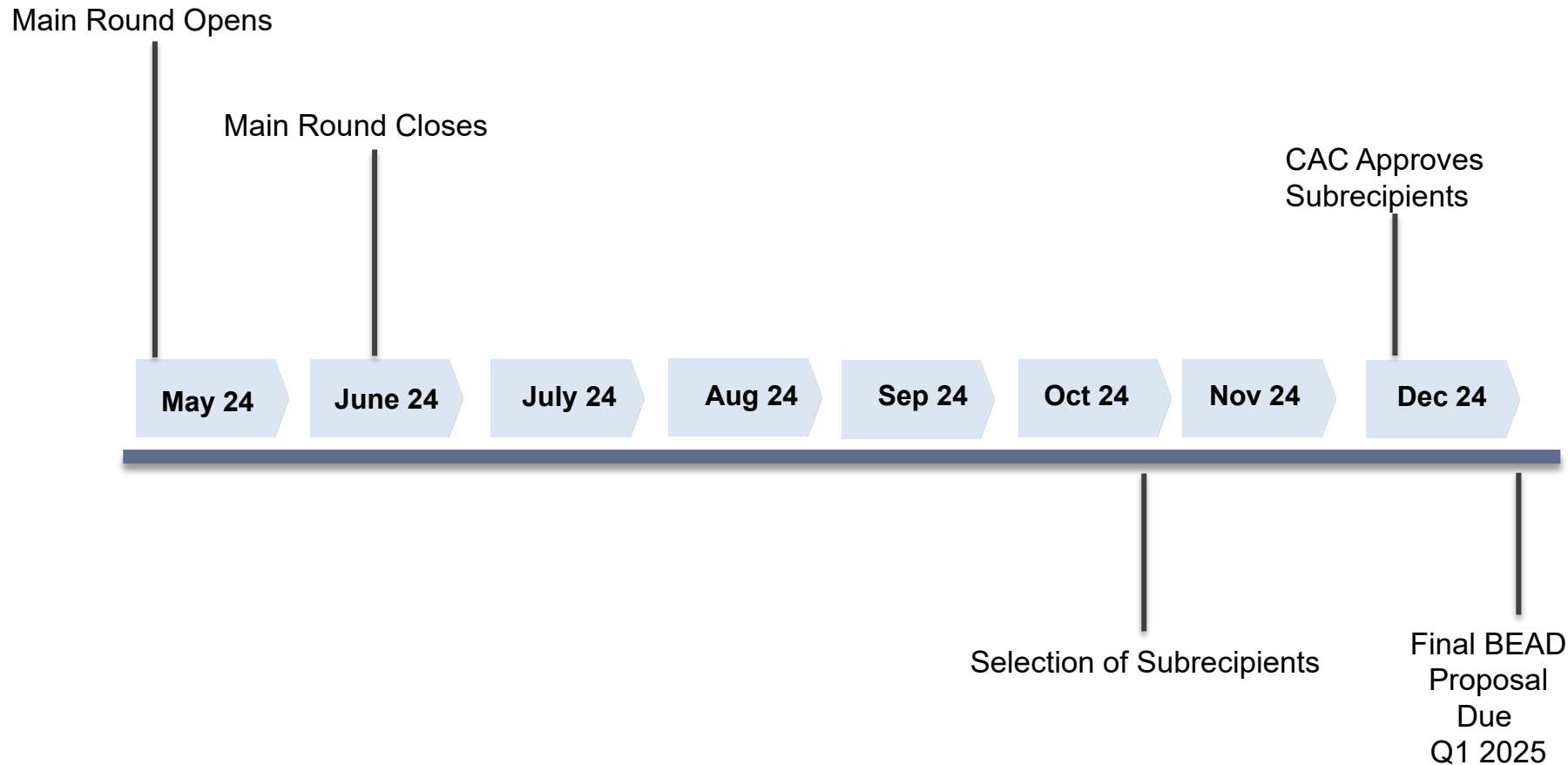
A screenshot of a web form titled "Test Opp. for Form". At the top right, there are four green buttons: "Print", "Help", "Download", and "Apply". Below the title is a section header "Opportunity Information" with a vertical green bar to its left. Underneath, there are two columns: "Title" with the value "Test Opp. for Form" and "Description" which is currently empty.A screenshot of a "Create New Account" form. The title "Create New Account" is at the top. Below it is a link: "If you have already registered, please click [here](#) to login." The form is divided into two sections: "User Information" and "Contact Information", each with a vertical green bar on the left. Under "User Information", there are three input fields: "Email Address\*" (empty), "Password\*" (empty), and "Confirm Password\*" (empty). There is also a "Role" dropdown menu with "Administrator" selected.

# Main Round Timeline and Review Approach



## Review Approach

The application review will follow the guidance set forth by IPV2 and the Notice of Funding Opportunity



\*\*All dates subject to timely NTIA approval of IPV2

# Main Round Base Application Components



Applicants will provide the following base information for all projects:

- List of Census Block Groups (CBGs) and Broadband Serviceable Locations (BSL) for each proposed project
- Total Funding Request
- Total Proposed Match
- Total Proposed Project Value
- Brief Project Description
- Total Route Miles and CAIs
- Identification of Requirement for Tribal Resolution

## Anticipated Templates and Application Tools

- Templated .csv file for CBG and BSL submission
- Sample project description language

# Main Round Financial Requirements



Component	Requirement	Review Standard
<b>Updated Financial Information</b>	<ul style="list-style-type: none"><li>• Opportunity to update any previously submitted financial information</li><li>• Interim Financial Statements for current fiscal year</li><li>• Financial Changes</li><li>• Available funds</li><li>• Letter of Credit Option</li></ul>	Review for indicators of financial stability, and commitment by financial institution for LOC or selected waiver option.
<b>Additional Project Specific Financial</b>	<ul style="list-style-type: none"><li>• Long-Term Business Plan</li><li>• Pro Forma (including CapEx and detailed assumptions narrative)</li></ul>	Review for completeness, feasibility and reasonability of proposed project plan.
<b>Certification</b>	<ul style="list-style-type: none"><li>• Operational Capacity Certification</li></ul>	Adherence to all required certifications and compliance requirements.

# Main Round Organizational Requirements



Component	Requirement	Review Standard
<b>Organizational Information</b>	<ul style="list-style-type: none"><li>• Opportunity to update any previously submitted organizational information</li></ul>	Review based on requirements outlined during previous application phase.
<b>Existing Project Information</b>	<ul style="list-style-type: none"><li>• Existing or planned applications for publicly funded projects</li><li>• Completed template with key project data</li></ul>	Review for completeness and validate to ensure there are no duplicate funding requests.
<b>Certification</b>	<ul style="list-style-type: none"><li>• Operational Capacity Certification</li></ul>	Adherence to all required certifications and compliance requirements.

# Main Round Project Staffing and Labor Requirements



Component	Requirement	Review Standard
<b>Project Staffing</b>	<ul style="list-style-type: none"><li>• Key Project Personnel Resumes</li><li>• Staffing and Recruitment Plans</li><li>• Training and Credentialing Plans</li><li>• Workforce Demographics (Unionized?, Size)</li></ul>	Review for alignment with proposed project needs.
<b>Subcontracting</b>	<ul style="list-style-type: none"><li>• Subcontracting Plan (if applicable)</li><li>• Subcontracting Selection Process</li><li>• Subcontracting Credentialing Requirements</li></ul>	Review for alignment with proposed project needs.
<b>Compliance</b>	<ul style="list-style-type: none"><li>• Certification of compliance with federal labor laws</li></ul>	Adherence to all required certifications and compliance requirements.



# Main Round Project Plan and Professional Engineer Certifications



Component	Requirement	Review Standard
<b>Project Plan</b>	<ul style="list-style-type: none"><li>• Project Plan Narrative</li><li>• Shapefile -- Existing Infrastructure</li><li>• Network Diagram</li><li>• Project Costs</li><li>• Project Timeline</li></ul>	Review for completeness, feasibility and reasonability of proposed project plan and other associated components.
<b>Professional Engineer Certifications</b>	<ul style="list-style-type: none"><li>• Technical certifications</li><li>• Fiber-optic scalability</li><li>• BSL speed capability</li><li>• Funded Network connection speed capability</li><li>• Network Topology and Capacity Certification</li><li>• Project Costs and Capital Investment Schedule Certification</li></ul>	Required certifications must be completed by a licensed professional engineer.

# Main Round Certification, Compliance and Ownership



Component	Requirement	Review Standard
<b>Certifications</b>	<ul style="list-style-type: none"><li>• EHP, BABA, Broadband Data Act, Cyber Security, Supply Chain</li></ul>	Adherence to all required certifications and compliance requirements.
<b>Compliance</b>	<ul style="list-style-type: none"><li>• Health and Safety</li><li>• Other applicable state and federal laws</li></ul>	Adherence to all required certifications and compliance requirements.
<b>Ownership</b>	<ul style="list-style-type: none"><li>• Ownership information</li></ul>	Adherence to all required certifications and compliance requirements.

# Main Round Scoring Criteria Submission Requirements



Applicants will indicate anticipated score in each category

<b>Component</b>	<b>Criteria Used to Judge Component</b>
BEAD Outlay	Proposed project cost
Affordability	Business plans and historic rate evidence
Fair Labor Practices	Third party database check and narrative supporting reported number of fair labor violations
Prevailing Wages	Supporting narrative detailing wage plans, if claimed will be included in contract compliance requirements
Speed to Deployment	Project timeline
Ratio of Unserved Areas	Proposed CBGs
Existing Infrastructure	Network diagram and associated shapefile
Length of Service in Montana	Business registration and submitted evidence
High-Cost Areas	CBG file
Number of Locations Served	CBG file

## Anticipated Templates and Application Tools

- Sample scoring spreadsheet (applicants will be asked to submit completed scoring spreadsheet)

# Main Round Application Review Process



- Initial Completeness Check
- Initial Scoring Validation
- Analysis of CBG coverage and identification of one, two, and no bid scenarios
- Issue notice of received applications
- Full application review based on scoring
- Negotiation for deduplication and no bid scenarios
- Recommendation for funding

# Components of Stakeholder Engagement and Technical Assistance



Proposed Technical Assistance			
Component	Topic	Anticipated Date	Mode
Prequalification	Q&A Session	03/08/2024*	Webinar
Prequalification	Q&A Session	03/15/2024*	Webinar
Main Round	Overview	04/03/2024*	Webinar
Main Round	Bidder's Conference	04/17/24 - 04/18/24*	In-Person
Main Round	Application System Demo	05/02/2024*	Webinar
Main Round	Financial	05/07/2024*	Webinar
Main Round	Technical	05/09/2024*	Webinar
Main Round	Environmental	05/14/2024*	Webinar
Main Round	Program Requirements	05/16/2024*	Webinar
Main Round	Q&A	05/24/2024*	Webinar

Note: Additional sessions focused on tribal engagement are being planned.

The Stakeholder Engagement and Technical Assistance framework comprises three integral phases: the Challenge Process, Prequalification, and Main Round.

Each phase builds upon the preceding one, equipping the applicant with the necessary information to successfully navigate through all three processes.

\*All dates listed are tentative, official dates will be posted on ConnectMT website once confirmed

\*All dates are estimated and subject to change\*