

KLAMATH & LAKE COUNTIES BROADBAND FEASIBILITY STUDY REQUEST FOR PROPOSAL (RFP)

INTRODUCTION

Klamath and Lake Counties, Oregon are seeking proposals for a broadband feasibility/engineering study.

The purpose of this RFP is to provide the Counties with the information needed to analyze, select and implement the best solutions to improve broadband connectivity across our entire region. This way, our broadband network meets the growing needs of our businesses, educational facilities, healthcare, transportation and tourism industries, is an asset for our communities and increases our economic development. The Counties recognize reaching our goal may require a mix of technologies and phased build-out plans.

Flexibility, ingenuity and innovation will be necessary to reach the ultimate goal of digitally connecting the Counties' entities through a next-generation network that offers reliability, resiliency, speed, and affordability to our communities.

Our vision:

All Klamath & Lake County residents will be able to use convenient, affordable next-generation broadband networks that enable us to survive and thrive in our communities.

To achieve this vision, we seek the best path to a broadband network that is ultimately scalable **100 Mbps** both for **upload and download** for homes, businesses, and anchor institutions. We recognize that a variety of models could be used to achieve our vision. We are open to all of them, including obtaining private sector investment, engaging in a public-private partnership, forming a new cooperative or operating as a government utility.

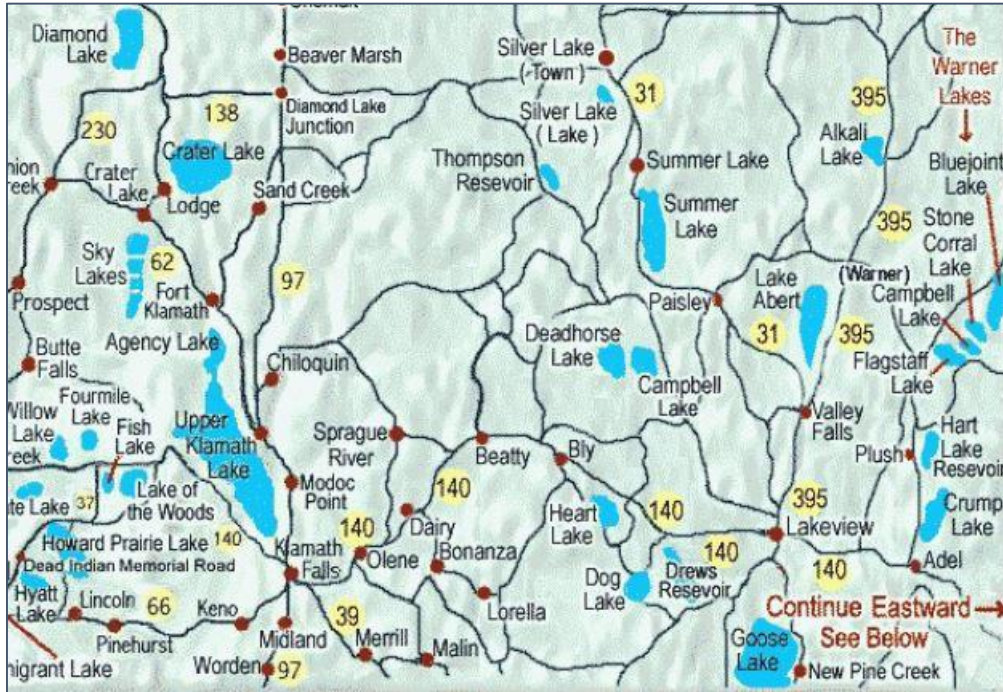
We expect this to be a highly interactive and iterative process, with excellent and ongoing communications between the selected vendor and the steering committee. At the end of the study process, the committee clearly understands the best alternatives for moving forward to achieve the vision.

DESCRIPTION OF KLAMATH & LAKE COUNTIES

Klamath County at 6,151 miles (3.93 million acres) and Lake County at 8,340 square miles (5.34 million acres) are the third and fourth largest Counties in Oregon. Together, these Counties cover over 14,490 square miles, with an average of 1 person per square mile in Lake County and 10 people per square mile in Klamath County.

A major highway route nearby includes U.S. Route 97, a north-south highway that runs through Oregon from the Oregon-California border, south of Klamath Falls, to the Oregon-Washington border on the Columbia River. Oregon Route 140 is the primary connection between the west side of the Cascades Mountains from Medford to Klamath Falls. Known as the Lake of the Woods Highway, 140 runs along the southwestern shore of Upper Klamath Lake, where it is part of the Volcanic Legacy Scenic Byway. It then continues east towards Lakeview for 96 miles on the Klamath Falls-Lakeview Highway.

As of 2017, the current population in Lake County is 7,837 and in Klamath County is 66,921. There are five incorporated towns in Klamath County: Klamath Falls, Malin, Merrill, Bonanza, and Chiloquin. There are two incorporated towns in Lake County: Lakeview and Paisley. In addition, there are various small, frontier, and remote unincorporated communities in both Counties. The median age in Klamath County is 42.6 and in Lake County is 48.7. Based on Oregon Employment Department data, the March 2021 unemployment rate for Klamath County was 7.0 percent and for Lake County was 5.6 percent. However, it is important to note that these numbers have fluctuated over the last year and a half due to the COVID-19 pandemic.



COUNTY CONTRIBUTIONS TO THE FEASIBILITY STUDY PROJECT

To support the selected vendor, the Counties will, at a minimum, provide the following:

- Recruitment of a project steering team.
- Recruitment of focus group participants.
- Access to County-wide GIS data.
- Access to historical County Permit Data.
- Other public information as needed.

SCOPE OF WORK/REPORTING REQUIREMENTS

Section A — Identify Broadband Gaps & Provide Mapping Services

- Look at available broadband services, service costs, provider infrastructure/capacity, gaps in physical connectivity access, minimum service requirements and affordability. A visual display will be generated showing connectivity status across the region that can be overlaid on a future display showing existing infrastructure and potential build paths. This information should be provided in a format usable by GIS systems.

- Assist in identifying current aerial infrastructure and existing fiber assets in the region that could be leveraged for this project.

Section B — Assist in Identifying and Providing Outreach to Private & Public Sector Stakeholders

- Discuss the current infrastructure and connectivity challenges and look for opportunities to establish partnerships and/or work cooperatively to fill in broadband gaps. This outreach should help identify assets and gap areas not previously identified in the initial assessment.

Section C — Assist in the Creation of a Regional Broadband Strategic Plan

- Identify and analyze a range of business models and funding mechanisms for the future network.
- Identify additional partnership opportunities:
 - Provide examples of prospective partners with a summary of how each relationship would function.
 - What sectors, groups and individuals may help our Counties achieve the broadband goals? Identify synergies and share opportunities that exist with providers and customers to include but not limited to:
 - ISP Providers, Telecoms, Cooperatives, Statewide telecom networks, Government entities, NGOs, K-12 and higher education, including library systems, healthcare providers, and the industry and business community.
- Work with the regional broadband steering committee to present recommendations to the regional partners and build consensus toward a final plan.
- Provide an assessment of the services available to our existing and prospective businesses and how that impacts our economic development efforts.
- Provide a market study to establish a likely market penetration rate and clarify which benefits from a new network might be most important to the residents and businesses. Include information from the following sources:
 - Available market and census data.
 - Local random sample County-wide survey of residents and businesses.
 - Focus groups of key constituencies.
 - Include a sample survey your company has used for similar projects and the resulting report as an appendix of your proposal.

Section D — Technology Options

- Determine the best technology path for our Counties:
 - What are the broadband capacities and considerations necessary now and in the future to enable our Counties to be economically competitive?
 - What technologies can provide broadband services at those speeds?
 - What are the technologies best suited to the various areas of the Counties, based on geography and demographics?

- What opportunities exist to provide a protected-ring fiber network that would connect businesses and anchor institutions such as schools, libraries, hospitals, public safety, cities, institutions of higher education and community support organizations?
- Discuss potential service options, such as:
 - A mix of technologies and phased build-out plans with multiple platforms scalable to 100 Mbps upload and download, including wireless, fiber, cable, etc.
 - Options should include scenarios using what already exists within the Counties, with a minimum service level of 100 Mbps upload and download.
 - Business models and pro forma to be analyzed to include but not be limited to:
 - Build on existing networks: Options to combine or collaborate with existing providers to provide middle and last-mile coverage to the underserved and unserved, with particular emphasis on leveraging American Rescue Plan Act (ARPA) dollars.
 - Create new networks:
 - a) Open Access: The Counties would finance and contract to build the network and invite other service providers to contract to deliver services over the network.
 - b) Proprietary Network:
 - I. The Counties would build and operate the network, with or without private sector operating partners.
 - II. The Counties would incent a private sector partner, including existing cooperatives, create a new cooperative or other entity to invest and/or build and operate a network using development powers as necessary.
 - III. Other options might involve multiple local entities or different scenarios as the contractor sees appropriate.
- Create a design and cost estimate for construction fiber optic middle mile network.
 - It should bring resources within reasonable reach of significant gap areas that are not good candidates for high speed satellite or commercial wireless broadband.
 - It should also include assessing primary and redundant backhaul connection options between a local network and the Internet.
 - Provides last mile connectivity to as many participating anchor institutions as possible, ensuring enough immediate revenue to cover potential network maintenance costs.
 - Takes into consideration how to best promote cellular deployment in signal gap areas.
 - Points out areas of concern such as railroad and bridge crossing, environmental impact areas, and gaps in existing aerial path.
 - Identifies where physical interconnects will be and is broken into logical, prioritized phases to allow for staggered funding/builds.
 - Takes into consideration current census block level data, rural density requirements, and other federal broadband grant funding restrictions and positions the network design phases for maximum fundability.

- Define the proposed service area and create a conceptual fiber route and high-level design to provide the greatest coverage, showing businesses and publicly owned facilities passed within 1/2 mile on both sides of the fiber route.
 - Use algorithmic tools to combine the map data with historical cost data to provide an estimated cost to offer scalable broadband service for all options identified. Costs will be calculated by service area and anticipated route miles to determine capital costs for fiber optic mainline, access equipment, cell tower backhaul, routers and switches. Costs should be all-inclusive of any design, initial configuration and installation costs.

Section E – Financing and Legal Considerations

- Provide financing options to include, but not limited to, general obligation bonds, revenue bonds, public/private partnerships, USDA RUS, other state and federal funding and others where appropriate.
- Provide an assessment of legal requirements, risks and regulations relevant to the building or operation and partnership arrangements.
- Prepare financial projections for at least two project scenarios as selected by the project steering committee:
 - Options identified.
 - Operational cash flow for expenditures.
 - One-time and recurring capital expenses.
 - Business and technical expertise needed.
 - Organizational support.
 - Community support.

PROPOSED SCHEDULE

- All proposals due **November 18, 2021**.
- Project implementation schedule and phasing - Please provide an estimated project timeline. The timeline should include:
 - Estimated project start and end dates.
 - Proposed date(s) for pre-project meeting with Counties' feasibility study steering committee.
- The consultant will provide biweekly updates on progress during the work period via email or phone calls to the designated County Representatives and/or steering committee.
- The consultant will provide copies of the final feasibility study along with digital copies.

REQUEST FOR PROPOSALS

The following will be considered minimal contents of the proposal:

1. Provide a restatement of the goals, objectives and project tasks to demonstrate the responder's view of the project and your approach to this project. Please reference the Study/Report Requirements: Sections A— E in your responses.
2. Provide your background and experience in the following areas:

- Network: Outline the direct knowledge and experience your company has regarding broadband solutions.
 - Financial: Describe your company's direct experience and knowledge in creating and analyzing financial plans and models, including capital requirements, operational pro formas and financing options.
 - Regulatory/Legal: Describe any direct experience and knowledge your company has in analyzing and interpreting the regulatory and legal landscape and providing analysis and guidance on these issues as they pertain to the various options contained in the proposal.
 - Services: Describe any direct experience and knowledge your company has in providing community and business community analysis and guidance surrounding broadband services.
 - Project Management: Outline your company's direct knowledge and experience with structured project management.
 - Partnerships: Share your company's experience in working with state and local governments and public-private sector collaborations.
3. Conflicts of Interest: Provide any information on prospective conflicts of interest, including existing or financial relations with equipment vendors, ISPs or other firms.
4. References: Include at least three (3) references from previous similar projects. Identify key personnel who will conduct the project and provide detail of their training and work experience. No change in key personnel assigned to the project will be allowed without the approval of the local project team. Address experience in working with rural communities, schools and townships regarding this type of study.
- Note: Subcontractors working for the contractor must meet all the requirements of the RFP and any contract between the contractor and the subcontractor must include all contract terms agreed to between the Counties and the successful contractor.
5. Detailed work plan to include:
- Tasks to be accomplished and the budget hours to be expended for each task and subtask (this will be used as a work plan and managing tool for the basis of invoicing).
 - Identify project timeline with deliverables and key milestones.
 - Provide detail regarding local involvement and services expected to complete the project. A minimum of three (3) status meetings are to be contained in the work plan to track progress in addition to any data collection or input/review meetings.
 - Outline the project management approach your company will employ to execute this project and identify individual(s) responsible for the various areas in the outline.
 - Identify areas of risk for the project based on your detailed work plan and schedule for all aspects of the project, including but not limited to financial, construction, legal, product availability, environmental and archaeological.
 - Provide a detailed cost estimate of the study, including known project expenses, professional hourly rates, multipliers, and estimated service/task hours with a "Not to Exceed" cap. Other ancillary expenses related to the completion of the study will be discussed on a case-by-case basis.

- Commit to working closely with steering committee and County Representatives.

EVALUATION CRITERIA

The local project team will evaluate all proposals using the following criteria to conduct a best-value evaluation:

- Experience and qualifications of the vendor and personnel assigned to this project.
- A clear understanding of this project.
- Evident technical proficiency for the mix of technologies and cohesiveness of the network proposed.
- Project work plan and timeline.
- Work experience in small and rural communities, including counties, cities and townships.
- Pricing.

After evaluating all proposals, the local project team may choose to interview the top candidates. After selecting, the review team will submit their recommendation to the county board for final approval to pursue a professional services agreement with the chosen candidate.

SELECTION

The selection of the consultant for this project will be based on the criteria noted above. Upon approval, the Counties will negotiate with the selected consultant to develop a Professional Services Agreement and finalize the work plan, including budget hours. Should the Counties and the selected consultant fail to agree to the work plan, including budget satisfactorily, the Counties are not liable and may enter into negotiations with the respondent judged second in the evaluation process, or the Counties may re-advertise for proposals and search for another consultant.

The Counties reserve the right to reject any and all proposals regardless of merit.

RFP TIMELINE

Release RFP	Day 1
Questions due to Counties	Day 21
Counties responses provided	Day 30
Proposals due	Day 45
Interviews, if necessary	Day 50
Approval of contract by county board	Day 60
Consultant Selection	TBD

Any proposal-related questions should be emailed to Denise Stilwell (denise@scoedd.org).

The above dates are subject to change at the discretion of Klamath & Lake Counties.

Please email your proposal to Denise Stilwell (denise@scoedd.org). Generic marketing or advertising materials not specific to your bid should not be included with your proposal.

Primary Contacts

Name: Denise Stilwell

Title: Executive Director

Klamath & Lake Counties Broadband Services RFP

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