



# Planning Funding Agreement Fast Track Option

June 20, 2006

Slide 1



## Introduction



Catharine Conover comes to the TA with experience in organizational change and communication. Catharine is a Consultant for the 800MHz TA who assists in Communications and Media Outreach efforts.



## Learning Objectives

### Upon completion of this recording, participants will:

- Be aware of submission deadlines and other requirements for submitting a Request for Planning Funding (RFPF)
- Be familiar with the criteria for eligibility for the Planning Funding Agreement (PFA) Fast Track Option
- Be aware of specific requirements in each section of the RFPF and Statement of Work (SOW) that impact Fast Track eligibility

**This module is NOT a complete step-by-step walkthrough of the RFPF Form and Instructions. Refer to other TA resources for additional information.**



## Agenda

### **THE RFPF SUBMISSION PROCESS**

- Should you submit?
- Deadlines
- Submission Process
- Templates & Tools

### **FAST TRACK CRITERIA**

- Fast Track Specific Criteria
- Important Reminders

### **REQUIREMENTS BY SECTION**



## Should you submit an RFPF?

- The TA does NOT recommend a PFA for all licensees.
  
- Consider including planning costs in your Cost Estimate and FRA if your system has:
  - Fewer than 500 subscriber units, or
  - Less than 30 business days of resource effort for planning.



## RFPF Deadlines

**The TA has established the following deadlines for the submission of RFPFs:**

	WAVE 1		WAVE 2		WAVE 3		WAVE 4	
	1-120	NPSPAC	1-120	NPSPAC	1-120	NPSPAC	1-120	NPSPAC
Voluntary Start Date for 1-120 / NPSPAC	Jun. 27 2005	Feb. 1 2006	Oct. 3 2005	Aug. 1 2006	Jan. 3 2006	Nov. 1 2006	Jul. 3 2006*	Feb. 1 2007*
Request For Planning Funding (RFPF) Submission Deadline	N/A	Jul. 17 2006	N/A	Aug. 1 2006	May 15 2006	Nov. 1 2006	Jul. 1 2006*	Feb. 1 2007*

\*Tentative dates; actual dates for this Wave depend on border treaties with Mexico and Canada

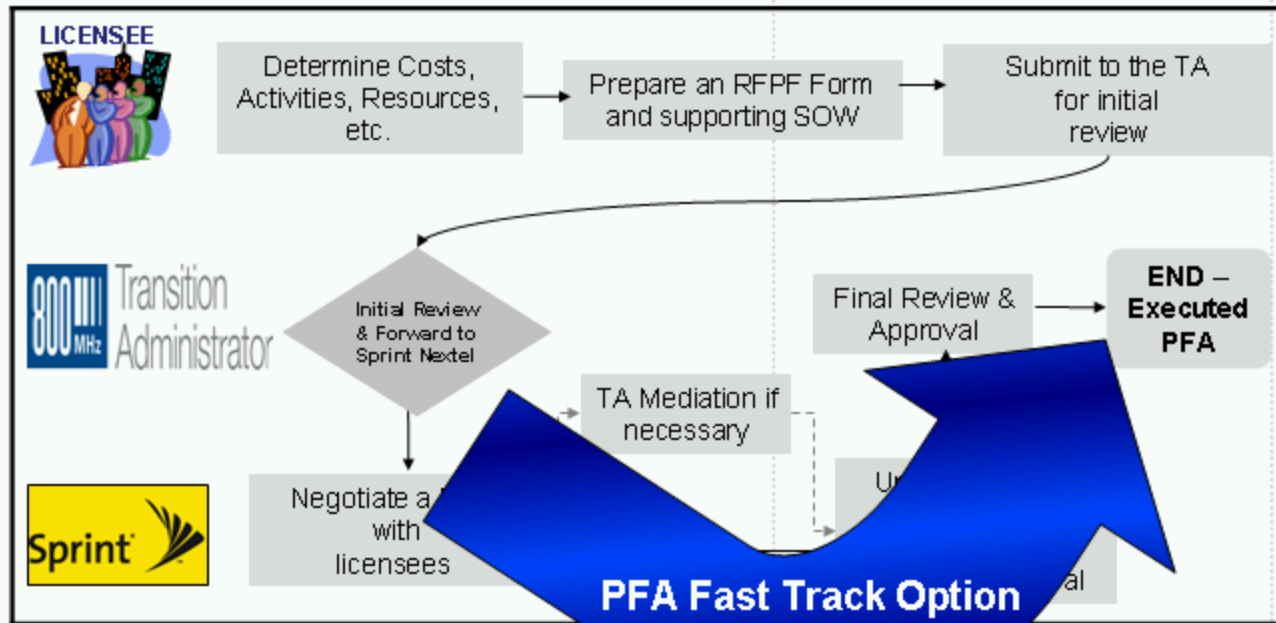
**If you miss the deadline, you should incorporate any necessary planning costs into the Cost Estimate as part of your Frequency Reconfiguration Agreement (FRA).**

**NOTE: Planning funding requests submitted after the deadline will not be accepted without adequate explanation as to why funding is required prior to negotiating an FRA.**



## Standard Process

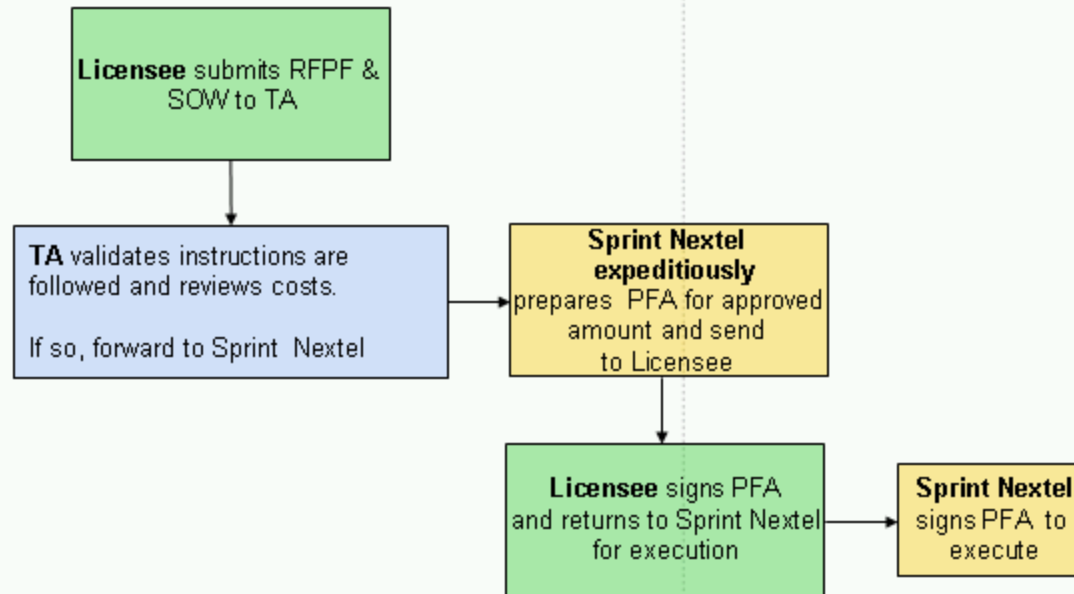
### The Steps to a PFA - Overview



### The Steps to a PFA - Overview



## Fast Track Submission Process



**NOTE:** If your RFPF does not qualify for Fast Track, it will follow the standard 60-day negotiation process.



## Templates & Tools

- RFPF Instructions** – Complete guide to filling out the RFPF Form and SOW.
- RFPF Form (and SOW) Template** – Microsoft Word Form. Use of this form is required to meet review guidelines.
- Funding Fact Sheet** – Quick reference aid with additional details and clarifications on the distinctions between the RFPF and Cost Estimate processes.
- Sample RFPF Package** – One "completed" RFPF Form and supporting SOW for a large/medium system and one for a small system.
- PFA Fast Track Fact Sheet** – Reference aid for licensees wishing to pursue the PFA Fast Track Option.
- TA Online Reference Guide** – Also known as the "Reconfiguration Handbook," this extensive resource covers topics from planning for reconfiguration through implementation. Go to <http://www.800TA.org/org/default2.asp>.



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## Fast Track Criteria

You must be able to determine *a reasonably accurate subscriber unit count* and:

- The total planning funding request includes *equates to \$55 or less* per subscriber unit
- The total legal costs should be *8% or less* of the total request
- The total costs for project management should be *25% or less* of the total request
- Conform to all other program guidelines* and instructions, including use of RFPF Form version 2.6

**NOTE:** All costs must be reasonable and prudent expenses directly related to the retuning of an 800 MHz system.



## The RFPF Form

**For Fast Track eligibility, use Version 2.6 or higher.**

A screenshot of the 800 MHz Transition Administrator website. The page features a navigation menu with links for Home, About the TA, 800 MHz Reconfiguration, FAQs, Document Library, News &amp; Events, and Contact the TA. The "Document Library" section is highlighted, listing various document types such as TA Presentations, FCC Notices, RPP Documents, Reconfiguration Forms, Reconfiguration Materials, TA Policy Documents, and Other TA Documents. The "Request for Planning Funding Guidance" section is also visible, with a sub-section for "Planning Funding Agreement Fast Track Option". A yellow callout box is overlaid on the screenshot, containing text about the availability of RFPF instructions and forms on the website.

***RFPF Instructions, Form, and Samples are available on the TA's website at:  
[www.800TA.org](http://www.800TA.org)***



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## Summary of All Costs Table

Planning Cost Category	Name of Internal and Vendor Service Provider(s)	Total Internal Costs (not to exceed)	Total Vendor Costs (not to exceed firm fixed price)	Expenses	TOTAL (Internal Labor Costs + Vendor Costs + Expenses)	% of Total Cost ([Category Total / Total Estimated Planning Costs] x 100)
Frequency Analysis						%
System Inventory						%
Engineering and Implementation Planning						%
Legal Costs Associated with Planning Funding Agreement						%  <b>≤ 8%</b>
Legal Costs Associated with Frequency Reconfiguration Agreement (optional)						
Project Management						%  <b>≤ 25%</b>
Other						%
<b>Total Estimated Planning Costs</b>						<b>Total=100%</b>

*Note: Ensure all costs and expenses are consistent between this table and the supporting SOW.  
Note: If 0% is indicated for any Planning Cost Category, it is assumed that the licensee is not seeking planning funding for this activity.*




## Summary of All Costs

**Total Number of Subscriber Units** (Guidelines regarding which Subscriber Units should be included in your count appear in the RFPF Instructions on page 9):

# \_\_\_\_\_

*Note: Since the Fast Track Option uses a \$55 per subscriber unit rate as a proxy for all other planning funding costs, licensees are reminded to provide a reliable, good faith estimate of the number of units.*

**Total Cost Per Unit** (Total Estimated Planning Cost/Total # Subscriber Units):

\$ \_\_\_\_\_ 



## Licensee Certifications

- You must certify that all known planning costs are included for the call signs listed.
- Licensees meeting the Fast Track criteria do NOT need to request mediation.
- The licensee of record with the FCC must sign the form



## 1.0 System Description

- Information in this section **MUST** be consistent with information provided by vendors and/or consultants!
- For purposes of determining Fast Track eligibility, the number of radios on a system should:
  - Include only those subscriber units that use the system for day-to-day communications.
  - Include units owned by other agencies that use the system under an agreement for day-to-day communications
  - Exclude subscriber units that only use the system for mutual aid or interoperability purposes.



*The incumbent should endeavor to make every reasonable effort to be as accurate as possible in determining the number of radios that will support determination of consideration for the Fast Track Option.*



## 2.0 Frequency Analysis

- ➔  Because NPSPAC frequencies are being moved in a block in each region, co-channel and adjacent channel analysis are not necessary.
- ➔  Co-channel analysis **is** acceptable for non-NPSPAC reconfigurations.
- ➔  Since adjacent channels are not a consideration in selecting replacement channels, any RFPF requesting adjacent channel analysis **will not** be considered for Fast Track.
- ➔  To request an Intermodulation Study, you need to suspect that one or more of three conditions exists:

Qualifying Scenarios	Suspected (yes/no)	Site(s) Affected (if known)
✓ Location with two or more co-located transmitters with potential to impair base station receivers.	<Yes/No>	<Site Name(s)>
✓ Licensee's fixed receive antenna is proximate to a transmitting antenna other than your own.	<Yes/No>	<Site Name(s)>
✓ Landlords or site managers of shared transceiver sites requiring an analysis of the IM environment as part of site agreements when changing transmitting frequencies.	<Yes/No>	<Site Name(s)>



## 3.0 System Inventory

- To be considered for the Fast Track Option, you must have a reasonably accurate subscriber unit count



## 4.0 Engineering/Implementation Planning

- Include activities and costs associated with developing your Implementation Plan and Cost Estimate.
  
- Drive or coverage/acceptance testing is considered part of reconfiguration implementation, not planning.



## 5.0 Legal Costs

- Costs included in this section should be limited to attorney's fees, **NO PROJECT MANAGEMENT COSTS.**
- Other activities and costs associated with negotiations should be entered under Project Management.
- Separate legal costs associated with a PFA from those associated with an FRA.
- It is not required to include legal costs associated with an FRA as part of your RFPF.
- Whether or not you include legal costs associated with an FRA along with those for obtaining a PFA, the **total legal costs should not exceed 8% of the total** RFPF amount in order to be eligible for Fast Track.



## 6.0 Project Management

- Non-project management activities, such as the activities included in developing an Implementation Plan and Cost Estimate, **should not be** included in the project management description or associated costs.
  
- Improperly categorizing project management costs could drive up the percentage of total that includes project management, making you ineligible for Fast Track.



## General Guidelines

- ✓  Read and carefully follow all instructions provided.
  
- ✓  Separate Hard and Transactional costs as described in the TA Cost Classification Policy.
  
- ✓  Be accurate, complete, and consistent.



## Help Us Help You

Submission of an accurate and complete RFPF makes the entire process go faster.

- ✘ Ensure data consistency between internal and vendor SOWs (e.g., missing or incorrect call signs, number of units, system details)
- ✘ Exclude any ADR-related costs (e.g., anticipated legal costs for mediation)
- ✘ Use the latest TA RFPF/SOW template (Version 2.6 or higher); fill out the Form correctly and completely using TA instructions
- ✘ Exclude actual testing or other reconfiguration implementation-related activities (e.g., performing a coverage test)
- ✘ Avoid work duplication and redundant tasks (e.g., two vendors proposing to manage the same project)

*Don't let challenges linger... Inform the TA as soon as an issue is identified that may prevent successful contract negotiations or reconfiguration implementation.*



## Next Steps

- Follow-up Survey:** The TA will be sending you an evaluation to provide feedback to us.

# Questions?

Register now at [http://www.800ta.org/content/news/webinar\\_form.asp](http://www.800ta.org/content/news/webinar_form.asp) to participate in one of our LIVE Q&A sessions. Times available are:

- June 28, 1:00 p.m. EST
- June 29, 1:00 p.m. EST



## Contact Information

### Wave Points of Contact

- Shane Satterlund – Wave 1
- Weldon “Joe” Blair – Wave 2
- Tom Brooks, Jr. – Wave 3
- David Buchanan – Wave 4

### Sprint Nextel Contact:

- Fax: 678-405-8252
- Email: [800MHz@Sprint.com](mailto:800MHz@Sprint.com)

### TA & Wave Points of Contact:

- Phone: 1-888-800-8220
- Fax: 1-888-701-4380
- Email: [comments@800TA.org](mailto:comments@800TA.org)
- Website: [www.800TA.org](http://www.800TA.org)